

Cross-ReferenceSteps

- l. Using the TAB key move to Printer ID field and type desired printer identification for agency default printer.
- m. Using the TAB key move to Printer Type field and type desired printer type of agency printer.
- n. Using the TAB key move to LaPAC Post? field and type **Y** or **N** to designate whether this agency will be permitted to post solicitations to the web via LaPAC.
- o. Using the TAB key move to Submitting Unit field and type desired FACS submitting unit.
- p. Using the TAB key move to Last FACS Order Number field and type desired last FACS order number.
- q. Using the TAB key move to Number of Notices field and type desired number of award notices this agency is to receive.
- r. Using the TAB key move to Contr Rev Del Auth field and type **Y** or **N** to designate whether this agency has been delegated authority from the Office of Contractual Review.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 1.7 Delete Agency Header Table

**Overview** The AGPS user is provided the capability to delete an agency header record with the Change function. This is accomplished by the use of the AGCY screen. **The agency record must be at status code 0.**

**Inputs** • Required agency number to be deleted

**Outputs** • Updated Agency Header Table

### Completing The Procedure

#### Cross-Reference

#### Steps

AGCY 4: AGCY

1. Determine the agency to be deleted.
  - a. If you are not in the AGCY screen, type **AGCY** in the Function Line and press RETURN/ENTER.
  - b. Type **INQUIRE** in the Function Line.
  - c. Using the TAB key move to Agency Number field and type desired agency number.
2. Press RETURN/ENTER. Requested agency record should be displayed.  
Type **DELETE** in the Function Line.
3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Date	8	Protected. Display of system date.
Time	8	Protected. Display of system time.
Term	8	Protected. Display of system terminal identification number.
Agency Number	6	Unprotected. Key. If left blank the system will return with the first agency number in the database. If input the system will return with the agency number specified.
Agency Title	35	Protected. Inferred title of the agency from the AGCY table.
Fiscal Year	4	Unprotected. Key. If left blank the system will return the first fiscal year in the database for the agency specified. If input the system will return the specified fiscal year if it exists. Format is CCYY.
Order Number	10	Unprotected. Key. If left blank the system will return with the first order in the database for this agency and fiscal year. If input the system will return with the record specified.
Vendor Number	11	Protected. The vendor number of the vendor of record for this order.
Vendor Name	25	Protected. The name of the vendor from the VEND table for this order.
Order Amount	9.2	Protected. The total dollar value of the order from the ORDR table.
Number of Lines	5	Protected. The number of lines that are attached to this order.
Agency Req Number	10	Protected. The agency requisition number assigned by the requisitioning agency for this order.

### AGCY

### Agency Header Table

ENTER FUNCTION:		TRANS: AGCY		DATE:	
AGENCY HEADER TABLE				TIME:	
KEY IS AGENCY NUMBER				TERM:	
AGENCY NUMBER.....:		DEPT FINANCIAL:			
AGENCY NAME.....:		STATE BID LIST:			
SHORT NAME.....:					
EXECUTIVE DEPT NAME:					
STATUS CODE.....:		:			
STATUS CHANGE DATE.:		REPORTS TO CENTRAL ACCT SYSTEM:			
CONTACT PERSON.....:					
CONTACT PHONE.....:		- - -		LAST CONTRACT REVIEW #:	
AGENCY TYPE.....:		:			
REPORTS TO AGENCY..:		NOTIFY AGENCY...:		REQ ORDER CONTRACT	
DEPT PURCH AGENCY..:				AGENCY BUYER:	
PRINTER ID.....:		PRINTER CODE:		LAPAC POST?:	
SUBMITTING UNIT.....:					
2-WAY/3-WAY MATCH..:		/		DELEGATED AUTHORITY LIMIT..:	
VARIANCE ALLOWED...:		% VARIANCE REC/INV/PAY.....:			
\$ NTE AMT INV/PAY..:		PURCHASE LIMIT.....:			
PAYMENT LIMIT.....:		NO. OF NOTICES:		LOCAL INVENTORY:	
CONTR REV DEL AUTH.:		ID LST CHG:		DT LST CHG:	

### Purpose

The purpose of the Agency Header Table is to provide the user with the ability to ADD, CHANGE, DELETE or INQUIRE agency header table data. The state bid list field allows the ability to indicate if the state vendor bid list is to be used ("Y") or not ("N") when no vendors are found on the agency CASV (Commodity by Agency Supplying Vendor) record. The department purchasing agency and buyer fields provide the ability to assign a requisition to a specific buyer for the requisitioning agency. Access is granted only to those records for which the user has security access.

### Screen

#### Characteristics

Add, Change, Delete and Inquire Agency Header Table records.

### Procedure

#### Cross-Reference

- Chapter 2 Agency Database Maintenance;
- 1.1 Add Agency Header Table
- 1.2 Establish Agency Accounting Distribution Labels
- 1.3 Establish Agency Dollar Threshold Processing Limits
- 1.4 Establish Agency 2 Way/3 Way Match

## AGENCY DATABASE MAINTENANCE

## DOCUMENTS

### AGCY: Agency Header Table

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
Contact Person	35	Unprotected. Required for add. The person within the agency designated as the person to contact for the agency.
Contact Phone	3/3/4/4	Unprotected. Optional entry. The area code, prefix, number, and any extension for the telephone number of the contact person. If entered, must be numeric and valid construct.
Last Contract Review #	6	Protected. The sequential numbering system that automatically numbers CFMS contracts when Date Approved is assigned by the Office of Contractual Review.
Agency Type	2	Unprotected. Required for add. The type of agency as outlined in BTAB Table AT (Agency Type).
Agency Type Title	30	Protected. Inferred interpretation of the agency type from BTAB Table AT.
Reports To Agency	6	Unprotected. Optional entry. The agency to which this agency reports in the organizational structure. If input, must be valid active entry in AGCY Table.
Notify Agency Req/Order/Contract	1/1/1	Unprotected. Optional entry. Used to indicate if the agency wants successfully completed requisitions, orders and contracts from AGPS accounting returned via electronic mail box. Defaults to "N" on an add. Valid entries are "Y/N".
Dept Purch Agency	6	Unprotected. Optional entry. The purchasing agency number of the agency responsible for the purchasing functions of this agency.
Agency Buyer Code	3	Unprotected. Optional entry. The buyer of the agency responsible for the purchasing functions of this agency. The buyer must be a valid entry in ABUY (Agency Buyer Table).
Printer ID	8	Unprotected. Optional entry. The designation of the printer where the agency's output information will print. If applicable, printer ID must be obtained from data processing personnel.
Printer Type	2	Unprotected. Optional entry. Used to identify the type of printer used.
LaPAC Post?	1	Unprotected. Optional entry. Used to identify if the agency has permission to post solicitations to the web via LaPAC. Defaults to "N" on add. Valid entries are "Y/N".
Submitting Unit	7	Unprotected. Required if agency reports financially to FACS, otherwise must be spaces.
2-Way/3-Way Match	1/1	Unprotected. Optional entry. Defaults to Y. Indicates if an agency is authorized (Y/N) to use the 2-Way and 3-Way Match Processes.

## AGENCY DATABASE MAINTENANCE

## DOCUMENTS

### AGCY: Agency Header Table

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
Delegated Authority Limit	9.2	Unprotected. Optional Entry. If entered, must be numeric and greater than zero. If greater than zero, will override global delegation of purchase authority limit residing in the Installation Table (BINS).
Variance Allowed	1	Unprotected. Optional entry. Currently used to indicate if an agency will be permitted variances on receiving/invoice/payment process. Allowable entries are Y and N. If Y, variances will be permitted as stated in the AGCY Table, default variances is in the Installation Table (BIN2). Defaults to Y on add.
% Variance Rec/Inv/Pay	2.2	Unprotected. Optional entry. If entered, must be valid numeric greater than zero. If variance is greater than spaces, will override global percentage variance of the BINS Table for this agency.
\$ NTE Amt Inv/Pay	9.2	Unprotected. Optional entry. Used to indicate the dollar limit of this agency for processing of invoices or payments. Amounts greater than this limit will result in an error being displayed.
Purchase Limit	9.2	Unprotected. Optional entry. Used to indicate the dollar threshold of this agency for processing of requisitions or orders. Amounts greater than this limit will result in the building of an appropriate approval record.
Payment Limit	9.2	Unprotected. Optional entry. Used to indicate the dollar threshold of this agency for processing of payments. Amounts greater than this limit will result in the building of an appropriate approval record.
Number of Notices	3	Unprotected. Optional entry. Specifies the number of copies of award notices that this agency is to receive.
Local Inventory	1	Unprotected. Optional entry. Defaults to space on add. Allowable entries are Y and N.
Contr Rev Del Auth	1	Unprotected. Required entry. Defaults to 'N' on add. Used to indicate if an agency has delegated authority from the Office of Contractual Review. Allowable entries are Y and N.
ID Lst Chg	8	Protected. The USERID of the person making the last change to this record.
Dt Lst Chg	8	Protected. The date of the last change to this record. Maintained by the system.

# VENDOR DATABASE MAINTENANCE

## PROCEDURES

### 1.1 Add Common Vendor Table

#### Cross-Reference

#### Steps

1. Determine vendor requirements for AGPS. As mentioned earlier, users need to verify that a vendor's record is not already present before attempting to add a new one. This inquiry can be accomplished by vendor number on the VENC screen, using only the FEIN or SSN. Alternatively, if the user only knows the vendor name, a name-to-number cross reference is available on the VNAME screen.

The **vendor number** consists of a nine digit vendor number and two digit location code for eleven digits. The first nine will be the vendor's FEIN or SSAN. The two digit location code will be used to denote multiple locations for the same vendor. The parent location code should be **00**.

2. Add VEND Table record data into AGPS.

#### VEND 4: VENC

- a. If you are not in the VENC screen, type **VENC** in the Function Line and press RETURN/ENTER.
- b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line.
- c. Using the TAB key, move to Vendor Code field and type desired vendor's Federal Employer Identification Number or Social Security Number plus 2-digit suffix.
- d. Using the TAB key, move to Vendor Name 1 field and type desired vendor name. Only use Vendor Name 2 field as a continuance if name will not fit on Name 1 field.
- e. Using the TAB key, move to Vendor Address 1 field and type desired vendor address. Only use Vendor Address 2 field as a continuance if address will not fit on Address 1 field. Use postal regulations in typing address. If address has a Suite, Attn, floor, etc. put on field 1 and put actual address on field 2. Do not put commas, dashes, or periods in address fields.
- f. Using the TAB key, move to City/ST/Zip field and type desired vendor city, state and zip code.
- g. Using the TAB key, move to Parish field and type desired parish code for vendor address if state is LA.

## **VENDOR DATABASE MAINTENANCE**

## **PROCEDURES**

### **1.1 Add Common Vendor Table**

#### Cross-Reference

#### Steps

- h. Using the TAB key, move to Country field and type desired country code for vendor address.
- i. Using the TAB key, move to Contact Person field and type desired contact person name.
- j. Using the TAB key, move to Phone field and type desired phone number for the vendor contact (area code - prefix- number-extension).
- k. Using the TAB key, move to Email field and type desired email address.
- l. Using the TAB key, move to Fax Number field and type desired fax number (area code – prefix – number).

NOTE: If the vendor's Remit To Address (address for sending payments) is different than the general (main) address, repeat steps e-l.



## **VENDOR DATABASE MAINTENANCE**

## **PROCEDURES**

### **1.1 Add Common Vendor Table**

#### Cross-Reference

#### Steps

3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## **1.2 Change Vendor Header Table**

### **Overview**

The AGPS user has the capability to change vendor header record's data in AGPS. This is accomplished by use of the VENC and VEND screens.

### **Inputs**

- Required vendor number
- Required change to vendor name
- Required change to vendor main address (city, state, zip)
- Required change to parish code if state is LA
- Required change to country code
- Required change to contact person
- Required change to contact phone
- Required change to vendor main or remit to email address
- Required change to vendor main or remit to fax number
- Required change to FEIN/SSAN
- Required change to primary vendor indicator
- Required change to 1099 vendor indicator
- Required change to master vendor indicator
- Required change to backup withholding indicator
- Required change to prevent deletion indicator
- Required change to requesting agency
- Required change to activation
- Required change pay to agency
- Required change to status code
- Required change to DBA name
- Required change to contact title

## VENDOR DATABASE MAINTENANCE

## PROCEDURES

### 1.2 Change Vendor Header Table

- Required change to contact toll free number
- Required change to previous name
- Required change to previous/new number
- Required change to suspend/debar date
- Required change to expiration date
- Required change to suspend/debar type
- Updated VEND Table

### Outputs

### Completing The Procedure

#### Cross-Reference

#### Steps

VEND 4: VENC

1. Determine vendor header data changes.
2. Change VENC screen data in AGPS.
  - a. If you are not in the VENC screen, type **VENC** in the Function Line and press RETURN/ENTER.
  - b. Type **INQUIRE** in the Function Line.
  - c. Using the TAB key, move to Vendor Number field and type desired vendor number.
  - d. Press RETURN/ENTER. Requested VENC record should be displayed.
3. Type **CHANGE** in the Function Line.

NOTE: Vendor must be inactivated to change.

  - a. Using the TAB key, move to Vendor Name 1 field and type desired vendor name.
  - b. Using the TAB key, move to Vendor Address 1 field and type desired vendor address.
  - c. Using the TAB key, move to City/ST/Zip field and type desired vendor city, state and zip code.

## **VENDOR DATABASE MAINTENANCE**

## **PROCEDURES**

### **1.2 Change Vendor Header Table**

#### **Cross-Reference**

#### **Steps**

- d. Using the TAB key, move to Parish field and type desired parish code for vendor address if state is LA.
- e. Using the TAB key, move to Country field and type desired country code for vendor address.
- f. Using the TAB key, move to Contact Person field and type desired contact person name.
- g. Using the TAB key, move to Phone field and type desired phone number for the vendor contact (area code - prefix- number-extension).
- h. Using the TAB key, move to Email and type desired email address.
- i. Using the TAB key, move to Fax Number and type desired fax number (area code – prefix – number).

NOTE: To change data in the Remit To Address, perform steps b-i.

- 4. Change VEND screen data in AGPS.

**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Date	8	Protected. Maintained by system. Current date.
Time	8	Protected. Maintained by system. Current time.
Term	8	Protected. Maintained by system. Terminal ID logged on to transaction.
Vendor Number	11	Unprotected. Key. Required. If left blank the system will start the vendor list with the first vendor in the database. If specified the system will return the list for the vendor specified.
Vendor Title	30	Protected. The vendor's name from the VEND table.
Complaint No	5	Unprotected. Key. Required. If left blank the system will start with the first Complaint Number for the vendor. If entered the system will return with the vendor/Complaint number combination specified.
Title Line 1	40	Protected. The first thirty characters of the descriptive title of this complaint.
Title Line 2	40	Protected. The second thirty characters of the descriptive title of this complaint, if the title exceeds thirty characters in length.
Agency Contact	35	Unprotected. Required. The name of the agency contact person.
Agency Phone	14	Unprotected. The phone number of the contact person in the agency that reported this complaint.
Vendor Contact	35	Unprotected. The name of the contact person for the vendor against whom this complaint is registered.
Vendor Phone	14	Unprotected. The phone number of the contact person for the vendor against whom this complaint is registered.
Complainant Name	35	Unprotected. Required. The name of the person who registered this complaint.
Complainant Title	35	Unprotected. The title of the person who registered this complaint.
Text	6x70	Unprotected. Optional. Text detailing the complaint being made against the vendor.

**VENC****Common Vendor Table**

```

ENTER FUNCTION:                TRANS: VENC
COMMON VENDOR TABLE (KEY IS VENDOR CODE)                DATE:
                                                            TIME:
                                                            TERM:
VENDOR CODE.:
NAME.:
NAME2.:
ADDRESS.:
ADDRESS2.:
CITY/ST/ZIP.:
PARISH.: :
COUNTRY.: :
CONTACT.:
PHONE.: - - - - -
EMAIL.:
FAX NUMBER.: - - - - -
-----REMIT-TO-ADDRESS-----

FEIN/SSAN.: PRIMARY VENDOR IND:
1099 VENDOR IND.: MASTER VEND IND:
BACKUP-WITHOLDING: PREVENT DELETION:
REQUESTING AGENCY: :

STATUS CODE.: : ACTIVATE (Y/N/C/P/S).:

```

**Purpose**

The purpose of the Common Vendor Table (VENC) screen is to provide the user with the ability to add vendor header and type 1 and 4 address records in AGPS and AFS. Access is granted only to those vendors for which the user has security access.

**Screen****Characteristics**

Add, Change, and Inquire VEND/VADR Table

**Procedure****Cross-Reference**

Chapter 2 Vendor Database Maintenance;

1.1 Add Common Vendor Table

## VENDOR DATABASE MAINTENANCE

## DOCUMENTS

### VENC: Common Vendor Table

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
Phone	14	Unprotected. Required. The area code, exchange, and number of the phone number for the contact person.
Remit To Address Phone	10	Unprotected. Optional. The area code, exchange, and number of the phone number for the contact person.
EMAIL	50	Unprotected. Optional. The email address for the vendor contact person.
Remit to Address EMAIL	50	Unprotected. Optional. The email address for the vendor contact person.
Fax Number	10	Unprotected. Optional. The fax number for the vendor contact person (area code – prefix – number).
Remit to Address Fax Number	10	Unprotected. Optional. The fax number for the vendor contact person (area code – prefix – number).
FEIN/SSAN	9	Unprotected. Required. Used to record the vendor's Federal Employer Identification Number (FEIN) or Social Security Account Number (SSAN).
Primary Vendor Ind	1	Unprotected. Required. Used to indicate if other locations use the Taxpayer Identification Number in the vendor file. Valid entries are 'Y' and 'N'. System defaults to 'N'.
1099 Vendor Ind	1	Unprotected. Required. Used to indicate whether or not the vendor is a 1099 vendor. Valid entries are 'Y' or 'N'. System defaults to 'N'.
Master Vend Ind	1	Unprotected. Required. Used to indicate the master vendor for 1099 purposes. Valid entries are 'Y' or 'N'. System should validate that no other vendor with the same value in the FEIN/SSAN field is already established as a master vendor.
Backup-Withholding	1	Unprotected. Required. Used to indicate whether or not a vendor is subject to backup withholding. Valid entries are 'Y' and 'N'. System defaults to 'N'. 'Y' can only be entered if the 1099 Vendor Indicator is also 'Y'.
Prevent Deletion	1	Unprotected. Required. Valid entries are 'Y' or 'N'. System defaults to 'N'. Field should only be set to 'Y' by OSRAP.
Requesting Agency	6	Unprotected. Required. Used to identify the agency requesting the establishment of a new vendor record. Defaults to user's Executive Agency number. OSRAP is the only agency authorized to update this field.

## **VENDOR DATABASE MAINTENANCE**

## **DOCUMENTS**

**VENC: Common Vendor Table**

### **Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Agency Title	35	Protected. Inferred title of the agency from the AGCY table.
Status Code	1	Protected. The current status of the vendor record.
Status Code Title	10	Protected. Inferred title of the vendor status. 1 = Active, 2 = Inactive, 3 = Suspended, 4 = Debarred, 5 = Casual, 6 = Pending Inactive, 7 = CFMS Pending Inactive.
Activation	1	Unprotected. C required for add. OSRAP is the only agency allowed to activate ('Y'), inactivate ('N'), pending inactive ('P'), or pending inactive CFMS ('S') a vendor. Updates hold-payment indicator on AFS to 'N' if Active or to 'Y' if Inactive or Casual Vendor. Updates vendor status on AGPS to '5' if Casual Vendor, '1' if Active, '2' if Inactive, '6' if Pending Inactive, or '7' if Pending Inactive CFMS.



**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Date	8	Protected. Maintained by system. Current date.
Time	8	Protected. Maintained by system. Current time.
Term	8	Protected. Maintained by system. Terminal ID logged on to transaction.
Status	1	Unprotected. Key. Required. This indicator describes the current status of this vendor. Must be a valid entry in BTAB table VS (Vendor Status Code).
Status Title	30	Protected. The interpretation of the Status Code from the BTAB table VS (Vendor Status Code).
Vendor Number	11	Unprotected. Key. Required. This is the code by which the vendor is identified in the system. Typically, it is either the Federal Employer Identification Number (FEIN) or the vendor's Social Security Account Number (SSAN). The vendor code includes a two-digit agency suffix.
Vendor Name 1	30	Protected. The first line of the name of the vendor.

**Chapter 6 Reports**

BV0A	Vendor Master – Alpha Listing .....	2
BV0B	Vendor Master – Numerical Listing .....	5
BV0C	Inactive Vendor Report .....	5
BV0D	Vendors Without Commodities .....	5
BV0E	Small Business Approved Vendors – Alpha Listing.....	5
BV1A	Report of Statewide Small Business Set Aside Compliance by Number of Purchase Orders and Contracts Issued Fiscal Year 9999.....	5
BV1A	Report of Statewide Minority Set Aside Compliance by Number of Purchase Orders and Contracts Issued Fiscal Year 9999.....	5
BV1A	Report of Statewide Women Owned Set Aside Compliance by Number of Purchase Orders and Contracts Issued Fiscal Year 9999.....	5
BV1A	Report of Statewide Small Business Set Aside Compliance by Dollar Amount Fiscal Year 9999.....	5
BV1A	Report of Statewide Minority Set Aside Compliance by Dollar Amount Fiscal Year 9999.....	5
BV1A	Report of Statewide Women Owned Set Aside Compliance by Dollar Amount Fiscal Year 9999 .....	5
BV2A	Complaints Against Renewable Contracts .....	5
BV3A	Open/Unresolved Vendor Complaints .....	5
BV4A	Vendor Performance History Summary for FY 9999 .....	5
BV5A	Vendor Bid History - FY 9999 .....	5
BV5A	Small Business Vendor Bid History - FY 9999 .....	5
BV15P	Report of Archived Vendor Enrollments .....	5
VLOG	Vendor Maintenance Log Report .....	5

**BV15P      Report of Archived Vendor Enrollments**

**Purpose**                      To provide the user a report of vendor enrollment records which have been archived.

**Distribution**

**Frequency of  
Preparation**              Annually.

**Sort  
Sequence**

**Page  
Break On**                      Report page break will occur when more than 1 full page of information exists.

**Retention  
Requirements**              None

**Report  
Description**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	Vendor Number	11	The vendor number from VROL
	Vendor Name	30	The vendor name from VEND
	Payment Type	1	The payment type from VROL
	Money Ordrr/Chk Num	10	The money order or check number from VROL

**VLOG            Vendor Maintenance Log Report**

**Purpose**                      To provide the user a listing of changes made to a vendor record in AGPS. The report lists the old and new data and will only display fields where the value was changed.

**Distribution**

**Frequency of  
Preparation**              Nightly

**Sort  
Sequence**                  By Vendor Number, Date and Time of change.

**Page  
Break On**                  Report page break will occur when more than 1 full page of information exists.

**Retention  
Requirements**

**Report  
Description**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	Vendor Code	11	Inferred vendor number for listed vendor from the VEND Screen.
	Userid Last Chgd	8	Inferred userid changing vendor record.
	Change Date	6	Inferred date changed for vendor record.
	Change Time	6	Inferred time changed for vendor record.
	Name 1	30	Inferred vendor name 1 from VEND Screen for listed vendor number.
	Name 2	30	Inferred vendor name 2 from VEND Screen for listed vendor number.
	Address 1	25	Inferred vendor address 1 for main vendor address listed on the VENC Screen.
	Address 2	25	Inferred vendor address 2 for main vendor address listed on the VENC Screen.

**VENDOR DATABASE MAINTENANCE****REPORTS****VLOG: Vendor Maintenance Log Report**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	City	15	Inferred city for main vendor address listed on the VENC Screen.
	State	2	Inferred state for main vendor address listed on the VENC Screen.
	Zip Code Vadr	11	Inferred zip code for main vendor address listed on the VENC Screen.
	Country Code	2	Inferred country code for main vendor address listed on the VENC Screen.
	Parish	2	Inferred parish code for main vendor address listed on the VENC Screen.
	Contact Person	30	Inferred contact person for main vendor address listed on the VENC Screen.
	Contact Ph Nbr Vend	14	Inferred contact phone number for main vendor address listed on the VENC Screen.
	Remit Address 1	25	Inferred vendor address 1 for remit-to vendor address listed on the VENC Screen.
	Remit Address 2	25	Inferred vendor address 2 for remit-to vendor address listed on the VENC Screen.
	Remit City	15	Inferred city for remit-to vendor address listed on the VENC Screen.
	Remit State	2	Inferred state for remit-to vendor address listed on the VENC Screen.
	Zip Code Vadr Remit	11	Inferred zip code for remit-to vendor address listed on the VENC Screen.
	Remit Country Code	2	Inferred country code for remit-to vendor address listed on the VENC Screen.
	Remit Parish	2	Inferred parish for remit-to vendor address listed on the VENC Screen.
	Remit Contact Person	30	Inferred contact person for remit-to address listed on the VENC Screen.
	Main Con Position	30	Inferred contact title for vendor listed on the VEND Screen.

**VENDOR DATABASE MAINTENANCE****REPORTS****VLOG: Vendor Maintenance Log Report**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	Remit Ph Nbr Vend	10	Inferred contact person phone number for remit-to address listed on the VENC Screen.
	Vend 800 Number	10	Inferred toll free number for vendor listed on the VEND Screen.
	Fein	9	Inferred Fein/Ssan number for vendor listed on the VENC Screen.
	Primary Vendor Ind	1	Inferred primary vendor indicator for vendor listed on the VENC Screen.
	Vendor Ind 1099	1	Inferred 1099 vendor indicator for vendor listed on the VENC Screen.
	Master Vend Ind	1	Inferred master vendor indicator for vendor listed on the VENC Screen.
	Backup Whold Flag	1	Inferred back-up withholding flag for vendor listed on the VENC Screen.
	Prevent Deletion	1	Inferred prevent deletion flag for vendor listed on the VENC Screen.
	Requesting Agcy Vend	6	Inferred requesting agency for vendor listed on the VENC Screen.
	Status Code Vend	1	Inferred status code for vendor listed on the VEND Screen.
	Pay To Agency	6	Inferred pay to agency for vendor listed on the VEND Screen.
	Setup Date Vend	6	Inferred date entered for vendor listed on the VEND Screen.
	Previous Name 1	30	Inferred previous name 1 for vendor listed on the VEND Screen.
	Previous Name 2	30	Inferred previous name 2 for vendor listed on the VEND Screen.
	To From Vend Nbr	9	Inferred prev / new number for vendor listed on the VEND Screen.
	Suspense Date	6	Inferred suspend/debar date for vendor listed on the VEND Screen.

**VENDOR DATABASE MAINTENANCE****REPORTS****VLOG: Vendor Maintenance Log Report**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	Suspense Exp Date	6	Inferred expiration date for vendor listed on the VEND Screen.
	Type Suspension	2	Inferred suspend / debar type code for vendor listed on the VENC Screen.
	Fee Expire Date	6	Inferred fee expire date for vendor listed on the VEND Screen.
	Fee Paid Ind	1	Inferred fee paid indicator for vendor listed on the VEND Screen.
	Status Chg Date Vend	6	Inferred change date for vendor listed on the VEND Screen.
	Business Type	2	Inferred business type for vendor listed on the VEN2 Screen.
	Organ Type	2	Inferred organization type for vendor listed on the VEN2 Screen.
	Business Own Code	2	Inferred business ownership code for vendor listed on the VEN2 Screen.
	State of Incorp	2	Inferred incorporation state for vendor listed on the VEN2 Screen.
	Incorp Date	6	Inferred incorporation date for vendor listed on the VEN2 Screen.
	Out of State Ind	1	Inferred out of state indicator for vendor listed on the VEN2 Screen.
	Foreign Vend Ind	1	Inferred out of country indicator for vendor listed on the VEN2 Screen.
	Nbr of Employees	6	Inferred number of employees for vendor listed on the VEN2 Screen.
	Independ Owned Ind	2	Inferred independent owned indicator for vendor listed on the VEN2 Screen.
	Rating Code	2	Inferred rating code for vendor listed on the VEN2 Screen.
	Company Size	2	Inferred company size for vendor listed on the VEN2 Screen.

**VENDOR DATABASE MAINTENANCE****REPORTS****VLOG: Vendor Maintenance Log Report**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION
	Ethnicity	2	Inferred ethnicity code for vendor listed on the VEN2 Screen.
	Minimum Quote Amt	11	Inferred minimum quotation amount for vendor listed on the VEN2 Screen.
	Payment Appr Ind	1	Inferred payment hold indicator for vendor listed on the VEN2 Screen.
	Gross Revenue	1	Inferred gross revenue code for vendor listed on the VEN2 Screen.
	Stkhldr Disclosure	1	Inferred stockholder disclosure flag for vendor listed on the VEN2 Screen.
	Date Filed	6	Inferred date filed for vendor listed on the VEN2 Screen.
	Remittance Fein	9	Inferred remittance vendor for vendor listed on the VEN2 Screen.
	Remittance Loc	2	Inferred remittance suffix for vendor listed on the VEN2 Screen.
	Date Bid Appl Rec	6	Inferred bid application received date for vendor listed on the VEN2 Screen.
	Dun Bradstreet No	10	Inferred dun and brad number for vendor listed on the VEN2 Screen.
	Cvt Code Number	5	Inferred cvt code for vendor listed on the VEN2 Screen.
	Reciprocity State	2	Inferred reciprocity state for vendor listed on the VEN2 Screen.
	EDI Mailbox Address	50	Inferred email address for main vendor listed on the VENC Screen.
	EDI Mailbox Ad Remit	50	Inferred email address for remit-to vendor listed on the VENC Screen.
	Fax Number	10	Inferred fax number for main vendor listed on the VENC Screen.



## **VENDOR DATABASE MAINTENANCE**

## **REPORTS**

**VLOG: Vendor Maintenance Log Report**

REF #	FIELD NAME	SIZE	DESCRIPTION OF INFORMATION

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**FOB Point.** This term is used to refer to a statement (Freight On Board) defining the point at which delivery is considered performed. E.G., Destination, Vendors Warehouse Dock, etc.

**GEO Bid Code.** This term is used to refer to a code that is used to define a geographical area for performance of an award issued as a result of a bid.

**Line Number.** This term is used to refer to two different transactions. If referring to the solicitation record, it refers to the line number of the solicitation line. If referring to the requisition record, it refers to the requisition line record.

**Master Bid Return Code.** This term is used to refer to a code used to define the condition of a vendor's bid at the solicitation level.

**Nature of Purchase.** This term is used to refer to a code used to define the nature of purchase of a solicitation document, i.e., routine, complex, difficult.

**Notice To Bidders.** This term is used to refer to a printed notice of availability of a solicitation, and is mailed to a vendor on a bid list instead of a solicitation.

**LaPAC Post.** This term is used to define an action that would place a copy of a solicitation and amendment to the web via the LaPAC system.

**Price Sheet Style.** This term is used to refer to a code used to define the style of price sheet to be used for solicitation processing of a solicitation line.

**Purchasing Agency.** This term is used to refer to an agency identified as being responsible for the purchase action of this solicitation.

**Solicitation Code.** This term is used to refer to a code used to define the required solicitation processing of a solicitation document.

**Solicitation Number.** This term is used to refer to a unique number assigned to a solicitation document for processing and tracking within AGPS.

**Source Code.** This term is used to refer to a code used to define the source of a solicitation bidding vendor record.

**Return Code.** This term is used to refer to a code used to define the condition of a vendor's bid at the line level.

**T-Number.** This term is used to refer to a code used for identifying type of or contract group for a contract award action.

## **Key Concepts**

### **Overview**

A solicitation is another of the key fundamental components of the purchasing process. Solicitation processing is that part of AGPS where the purchasing agency requests the vendors to submit an offer for the supplies or services. The data entered previously on the requisition is used in the solicitation and ultimately the contract or order. The solicitation identifies and describes the supplies or services to be purchased and when and where they are to be delivered. The purchasing agency uses the information recorded during solicitation processing to award the contract or issue the order for the supplies or services.

### **Solicitation Components**

The solicitation process is divided into four major components: preparing solicitations, amending solicitations, recording bids, and awarding orders or contracts to vendors. Preparing solicitations includes creating the solicitation header, attaching requisitions, and establishing characteristics such as certifications, conferences, and vendor selection criteria. Amending solicitations includes creating an amendment document that includes changes to the solicitation such as the bid opening date. Recording bids includes opening, recording, and tabulating bids. Awarding contracts includes setting award flags and changing the solicitation status codes.

### **Types of Solicitations**

There are two basic types of solicitations defined as document types which determine the process to be used to accomplish the purchase. Formal solicitations require submittal of sealed bids and public bid openings. Informal solicitations also require submittal of sealed bids but may not require a public bid opening as in the case of an invitation to bid. The solicitation code combined with award code and requisition document type will determine the process for award. Awards may be for non-contract items resulting in open market purchase orders. Awards may also result in contracts for recurring purchases.

### **Solicitation Amendments**

These documents are used to change solicitation specifications or terms and conditions in a minor way. If there is a major change to the solicitation, it should be cancelled and reissued. The most common amendment is to change the date of a bid opening, either by itself or in conjunction with other changes. Amendments are distributed to all vendors who received a copy of the solicitation unless they have been eliminated by the purchasing agency for some reason.

### **Recording of Bids**

A bid can only be recorded if the bidder is in the AGPS vendor database and is associated with the solicitation. Bid return codes are used to describe the condition of bids and how they should be handled. For example, a non-responsive bid is one that does not respond to the essential requirements of the solicitation and will not be considered for award. AGPS will handle primary and alternate bids, if authorized and submitted.

Solicitation  
Vendor Table  
(SVEN/SVE2/  
SVE3)

The solicitation vendor table transaction(s) is to used to add and maintain solicitation bidding vendor record(s) for a solicitation. This same record is subsequently used for recording vendor bid response data, bond data and conference attendance at the solicitation level.

Solicitation  
Amendment  
Table (SAMD)

The solicitation amendment table transaction is used to add and maintain solicitation amendment(s), revise bid opening date and time for a solicitation and select vendors to receive a copy of a solicitation amendment. This transaction also identifies the type of amendment action processed for that solicitation.

Solicitation  
Amendment Text  
Table (SATX)

The solicitation amendment text table transaction is used to create and maintain solicitation amendment(s) text for a solicitation amendment.

Requisition  
Vendor Table  
(RVE2)

The requisition vendor table transaction is used to record the vendor's response and condition of that response at the solicitation/requisition line level. Additionally, this transaction is also used to indicate award of the solicitation/requisition line.

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**Function  
Overview**

The solicitation process is used to create vendor bid lists, send solicitations to vendors and request bids from vendors. The solicitation process is designed to process all types of solicitation documents: telephone quotations, sophisticated services solicitations, and web posting.

This process begins with the buyer creating a new solicitation, attaching a requisition to the solicitation, adding characteristics to the solicitation, creating a bid list, and preparing the solicitation to be printed and/or posted.

When the solicitation is created, the solicitation does not have complete information to continue processing. The remainder of the information is made available when a requisition is attached to the solicitation. When that occurs, the solicitation assumes the character of the requisition. Any subsequent requisitions attached to the solicitation must have similar characteristics as the first requisition attached (e.g., same award/solicitation code, same purchase agency, same buyer code, same set-aside code, etc).

There are a number of optional data elements which may be set by the buyer. For example, bid bond required, performance bond required, geographic bid codes, set aside criteria, cooperative procurement indicator, additional classes/subclasses, posting to the web, etc.

Conferences may be set up for the solicitation. Up to three conferences may be established. Certifications may be required by the solicitation. Up to five certifications may be requested as a part of the solicitation. Price sheet styles may be created for the solicitation. Vertical and horizontal price sheets may be created and column headers changed for each.

The solicitation may be scheduled using the automatic scheduling capability of AGPS or a manual schedule may be created. In either case, at least the bid opening date and time must be entered prior to attempting to issue the final solicitation.

Vendors will be automatically retrieved from the Commodity database when a draft or final solicitation is printed. The vendors retrieved will be controlled by the set aside criteria entered by the buyer. Vendors recommended by the user and included on the requisition will be automatically included. Vendors may be manually added to the bid list. These vendors need not be registered as a supplier of the commodity or service.

By setting the proper status code, the buyer may print multiple draft solicitations and one final solicitation. Along with the drafts and final solicitations, the buyer will receive a printed bid list of all vendors on the bid list for that solicitation.

After the bids are opened (whether formally or informally), the user should determine if all bidders are a part of the bidders list. If a bidder is not on the bidders list, that bidder should be added to the bidders list so the bid can be recorded. Bids cannot be recorded if a vendor is not in the AGPS Vendor database and included as a bidder on the solicitation.

To add the vendor to the bid list, see paragraph 4 Create/Change Solicitation Bidder Lists above.

There is information that pertains to the entire solicitation such as discount terms, FOB point and delivery date. This is referred to as vendor-level information. There is information that pertains to the individual lines on the solicitation such as unit price, brand name and model number and vendor preference. This is referred to as line-level information.

The vendor-level information is entered and the master bid return code is entered. The master bid return code characterizes the condition of the bid as acceptable, errors existed, exceptions taken, etc. The master bid return code is also used to determine if the vendor responded, and to update the Commodity and Vendor databases to show the vendor's response.

The line-level information is entered for each line bid and the bid return code is set on the line as well. The same bid return codes are used but in this case it applies only to the solicitation line. This information will be used to tabulate and rank this bid against all other bids recorded for this solicitation line.

Bid return codes are used to describe the condition of the vendor's bid and how it should be treated. The macro level (Master Bid Return Code) applies to the entire bid. The micro level (Bid Return Code) applies to each line item being purchased and responded to by the vendor. The various types of bid return codes are listed below:

- Vendor Returned Responsive Bid
- Vendor Failed to Respond
- Vendor Returned Responsive Bid (With Minor Exceptions)
- Vendor Returned Non-Responsive Bid
- Vendor Returned a No-Bid
- State Rejected Vendor's Bid
- Vendor Withdrew Bid
- Disregard this Bid

A **Vendor Returned Responsive Bid** is one which does not vary from the specifications and terms set out in the solicitation document. This bid return code identifies the bid as being acceptable and as such will be considered in the award process. This bid return code can apply to the entire bid or to lines on the bid. The bid return code that applies is 01. Before an award can be made on the line, the bid return code must be set to 01.

01 - Responsive Bid Returned

A **Vendor Failed To Respond** bid return code is used to identify when no response is received from the vendor. All bid return codes are initialized with this bid return code. If the vendor fails to respond, then nothing has to be done to this record. The bid return code that applies in this area is (03):

03 - Bid Not Returned

A **Vendor Returned Responsive Bid (With Minor Exceptions)** is one which does not vary from the specifications and terms set out in the solicitation document but does have some minor irregularity. This bid return code identifies the bid as one that may be accepted by the State or not. Routinely the bid would be accepted even with the irregularity. This bid return code can apply to the entire bid or to lines on the bid. The range of bid return codes which apply in this area are (10-3Z):

- 10 - Failed to Acknowledge Amend
- 11 - Alternate Bid Received
- 12 - Sample Not Received
- 13 - Literature Not Received
- 14 - Exception to Bid
- 15 - Exception - Other
- 16 - Failed to Initial Price Alter
- 17 - 3Z - Reserved

A **Vendor Returned Non-Responsive Bid** is a bid that does not conform to the essential requirements of the solicitation document. In its current state, this bid will not be considered for award. The range of bid return codes which apply in this area are (40-5Z):

- 40 - Bid Not Signed
- 41 - Bid Received Late
- 42 - Bid Submitted in Pencil
- 43 - Bid Bond Not Received
- 44 - Did Not Attend Mandatory Pre-Bid Conference
- 45 - Did Not Attend Mandatory Site Visit
- 46 - Failed to Return Req'd Certificate
- 47 - Failed to Return
- 48 - 5Z - Reserved

**Vendor Returned a No-Bid.** This set of bid return codes identifies no-bids. The range of bid return codes which apply in this area are (60-6Z):

- 60 - "No Bid" - Keep on Bid List
- 61 - "No Bid" - Remove From Bid List
- 62 - "No Bid~ - Can't Perform
- 63 - 6Z - Reserved

**State Rejected Vendor's Bid.** This range of bid return codes is used to identify that the bid was rejected and the reason why it was rejected. This range of bid return codes can be used only as a Master Bid Return Code. If a bid on a line is determined to be unacceptable, that line should be determined to be Non-Responsive. Once a bid has been rejected, that vendor cannot receive an award for that solicitation. The range of bid return codes which apply in this area are (70-7Z):

- 70 - Minimum Purchase Amt Unacceptable
- 71 - Does Not Meet Specifications
- 72 - Unit of Measure Change Unacceptable
- 73 - Minimum Quantity Unacceptable
- 74 - No Sample

75 - Does Not Meet Terms & Conditions  
76 - Reserved  
77 - Price Subject to Change  
78 - 7Z - Reserved

**Vendor Withdrew Bid.** This range of bid return codes is used to identify the bids that were withdrawn by the vendor. This range of bid return codes can be used only as a Master Bid Return Code. If a bid on a line is determined to be unacceptable, that line should be determined to be Non-Responsive. Once a bid has been withdrawn by the Vendor, that vendor cannot receive an award for that solicitation. The range of bid return codes which apply in this area are (80-8Z):

80 - Withdrawal for Mistake in Bid  
81 - Withdrawal for Bankruptcy  
82 - Withdrawal - Miscellaneous  
83 - 8Z - Reserved

**Disregard This Bid.** This bid return code is used to code those bids which are not to be considered in any evaluation process. This bid return code would be used to code any vendor's bid which may have been entered in error. The vendor's bid cannot be deleted so this bid return code has the impact of a physical delete of the record. This bid return code may be used on the overall bid or on a line on the bid. The bid return code that applies in this area is (99):

99 - Disregard this Bid

To receive a bid tabulation (tabs) after recording of bids, the buyer must set the status code on the solicitation to 375. The tabulation will be printed to assist in the evaluation process. Bid tabs will point out any inconsistencies recognized by AGPS such as, bid quantity not equal to solicitation quantity, bid unit of measure not equal to solicitation unit of measure, vendor inactive, unit price times quantity not equal to extended amount, line bid return code not acceptable, etc. The solicitation lines may be grouped to produce alternative rankings. The bid tab will rank the vendors for each item and for the group. Bid tabs may be ranked using the traditional low to high ranking or low to high considering prompt payment discount or high to low such as with discounts or no ranking at all.

A bid tab, after recording of bids, may be requested as well as that a proposed award be made by AGPS. This is done by setting the solicitation status code to 370. The proposed award is made based on information in AGPS and will be made only if all information on the line for the apparent low bidder is acceptable. For example, if a variance exists, the award will not be made. The proposed award may be accepted by the buyer or it may be overridden. The purpose of the proposed award is to minimize the number of buyer keystrokes.

Once the buyer has evaluated the bids and determined which bidder is to be awarded by each line, the award flag on the bidder's bid record for the line must be set. If the award flag is set manually, it must be set to Y. If AGPS performs a preliminary award, it will be set to S (for system set). If a subsequent award document is cancelled, AGPS will set the award flag to U (for un-award). The S or U may be changed to Y or N by the buyer.

Following are the details of the procedures to create a solicitation, attach requisitions, add characteristics to the solicitation, add vendors and prepare the solicitation for printing and/or posting, issuing the solicitation, recording bids, processing bid tabulations and processing awards.

## **1 ADD/CHANGE SOLICITATION RECORDS**

### **1.1 Add Solicitation Header Table**

**Overview** The AGPS user is provided the capability to add the solicitation header table record in AGPS in preparation of solicitation processing. This document will contain all required solicitation data for processing. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation title
- Required purchase agency

**Outputs**

- Updated SDOC Table

#### **Completing The Procedure**

##### Cross-Reference

##### Steps

- |              |    |   |
|--------------|----|---|
|              | 1. | Determine solicitation requirement(s).  |
| AGCY 4: AGCY |    | <b>Purchasing Agency</b> must be key to a valid and active record in the AGCY Table.  |
| INST 4: BAAT |    | User must have access and maintenance for the purchasing agency to process a record in SDOC.  |
|              | 2. | Add SDOC Table data into AGPS.  |
| SDOC 4: SDOC | a. | If the user is not in the SDOC screen, type <b>SDOC</b> in the Function Line and press RETURN/ENTER.  |
|              | b. | Type <b>CLEAR</b> in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and <b>ADD</b> inserted in the Function Line. |
|              | c. | Using the TAB key, move to Solicitation Number field and type <b>NEXT</b> .   |
|              | d. | Using the TAB key, move to Title Line 1 field and type desired solicitation title. If line 1 is not enough, TAB to line 2 and complete title..          |

## **SOLICITATION PROCESSING**

## **PROCEDURES**

### **1.1 Add Solicitation Header Table**

<u>Cross-Reference</u>	<u>Steps</u>
	<ul style="list-style-type: none"><li>e. Using the TAB key, move to Purchasing Agency field and type desired purchasing agency.</li></ul>
	<ul style="list-style-type: none"><li>3. Press RETURN/ENTER.</li></ul>
	<p>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.</p>
	<p>The solicitation record will be created with the next sequential number assigned by AGPS. The document type will show "UNK" - Unknown, the solicitation code will show "U" - Unknown and the award code will show "U" - Unknown. When the first requisition is attached, these data elements will be changed to the values from the requisition.</p>



## **1.2 Change Solicitation Header Table**

<b>Overview</b>	The AGPS user is provided the capability to maintain the solicitation header table record in AGPS after add in preparation of solicitation processing. This is accomplished with use of the SDOC screen.
<b>Inputs</b>	<ul style="list-style-type: none"><li>• Required solicitation number</li><li>• Required changes to days bids firm</li><li>• Required changes to solicitation title</li><li>• Required changes to status code</li><li>• Required changes to number of RFP copies</li><li>• Required changes to purchase agency</li><li>• Required changes to LaPAC Post</li><li>• Required changes to delivery days aro or weeks aro</li><li>• Required changes to alternate delivery schedule</li><li>• Required changes to FOB point</li><li>• Required changes to coop procurement</li><li>• Required changes to set aside code</li><li>• Required changes to T-Number</li><li>• Required changes to whim approval indicator</li><li>• Required changes to evaluation type</li><li>• Required changes to type price sheet</li><li>• Required changes to specify brand indicator</li><li>• Required changes to type bid tabulation</li></ul>
<b>Outputs</b>	<ul style="list-style-type: none"><li>• Updated SDOC Table</li></ul>

### Completing The Procedure

<u>Cross-Reference</u>	<u>Steps</u>
	1. Determine solicitation changes. This will normally be performed after a requisition has been attached to a solicitation.
AGCY 4: AGCY	<b>Purchasing Agency</b> must be key to a valid and active record in the AGCY Table.
INST 4: BAAT	User must have access and maintenance for the purchasing agency to process a record in SDOC.
INST 4: BTAB	<p><b>Status Code</b> must be a valid entry in BTAB Table SB (Status Code Solicitation).</p> <p><b>Set Aside Code</b> must be a valid entry in BTAB Table SA (Set Aside Type).</p> <p><b>T-Number</b> must be a valid entry in BTAB Table TA (T-Number).</p> <p><b>Evaluation Type</b> must be a valid entry in BTAB Table ET (Evaluation Type).</p> <p><b>Type Price Sheet</b> must be a valid entry in BTAB Table PS (Price Sheet Type).</p> <p><b>Type Bid Tabulation</b> must be a valid entry in BTAB Table TB (Bid Tabulation Type).</p>
	2. Change SDOC Table data in AGPS.
SDOC 4: SDOC	<p>a. If the user is not in the SDOC screen, type <b>SDOC</b> in the Function Line and press RETURN/ENTER.</p> <p>b. Type <b>INQUIRE</b> in the Function Line.</p> <p>c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.</p> <p>d. Press RETURN/ENTER. Requested solicitation record should be displayed.</p>
	3. Type <b>CHANGE</b> in the Function Line.

# SOLICITATION PROCESSING

# PROCEDURES

## 1.2 Change Solicitation Header Table

### Cross-Reference

### Steps

- a. Using the TAB key, move to Days Bids Firm field and type desired number of days that a vendor must honor a submitted bid for this solicitation.
- b. Using the TAB key, move to Title Line 1 field and type desired solicitation title. If line 1 is not enough, TAB to line 2 and complete title.
- c. Using the TAB key, move to Status Code field and type desired status code.

If ...	Then ...
Identifying solicitation for supervisor review	Type status code = 301
Identifying solicitation for buyer review	Type status code = 302
Re-bid of solicitation	Type status code = 305
Initiate Approvals	Type status code = 325
Preparing a bid list	Type status code = 335
Printing a draft solicitation (O/L)	Type status code = 345
Printing a draft solicitation (O/N)	Type status code = 350
Issuing a solicitation (O/L)	Type status code = 355
Issuing a solicitation (O/N)	Type status code = 360
Recording bids	Type status code = 365
Printing a bid tabulation with automatic award (setting of award flags in RVEN for proposed awardee)	Type status code = 370
Print bid tabulation w/o award	Type status code = 375
Processing partial award (O/L)	Type status code = 379
Processing partial award (O/N)	Type status code = 380
Processing final award (O/L)	Type status code = 384

## SOLICITATION PROCESSING

## PROCEDURES

### 1.2 Change Solicitation Header Table

Cross-Reference

Steps

If ...	Then ...
Processing final award (O/N)	Type status code = 385
Canceling solicitation	Type status code = 396-399

- d. Using the TAB key, move to # RFP Copies field and type desired number of RFP copies.
- e. Using the TAB key, move to Purchasing Agency field and type desired purchasing agency.
- f. Using the TAB key, move to LaPAC Post field and type desired post solicitation indicator. Allowable entries are **Y** or **N**. If **Y**, solicitation will automatically post to the LaPAC internet site when a final print is accomplished.
- g. Using the TAB key, move to Delivery Days ARO field and type desired number of delivery days.
- h. Using the TAB key, move to Delivery Weeks ARO field and type desired number of delivery weeks.
- i. Using the TAB key, move to Alt Del Schedule field and type desired indicator. Allowable entries are **Y** or **N**.
- j. Using the TAB key, move to FOB Point field and type desired FOB point.
- k. Using the TAB key, move to Coop Procurement field and type desired indicator. Allowable entries are **Y** or **N**.
- l. Using the TAB key, move to Set Aside Code field and type desired set aside code.
- m. Using the TAB key, move to T-Number field and type desired T-Number.
- n. Using the TAB key, move to Whim field and type **P** (purchasing).
- o. Using the TAB key, move to Evaluation Type field and type desired evaluation type.
- p. Using the TAB key, move to Type Price Sheet field and type desired type price sheet.

<u>Cross-Reference</u>	<u>Steps</u>
	<p>q. Using the TAB key, move to Specify Brand field and type desired indicator. Allowable entries are <b>Y</b> or <b>N</b>.</p> <p>r. Using the TAB key, move to Type Bid Tabulation field and type desired type bid tabulation.</p> <p>NOTE: If the solicitation is requesting a percentage discount from a catalog, the bid tabulation type must be <b>P</b> in order to record the percentage.</p> <p>4. Press RETURN/ENTER.</p> <p>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.</p>

## 6.2 Print/Issue And/Or Post Final Solicitation

### Overview

The AGPS user is provided the capability to print and/or post a final solicitation for issue in AGPS. When the buyer has prepared the solicitation in draft and is ready to print and/or post the final solicitation, the final solicitation may be printed and/or posted by entering a bid opening date and time on the SDO3 transaction and by setting the status on the SDOC transaction to 355 for O/L or 360 for overnight. At this status code, AGPS will automatically create a bid list based upon the criteria on the solicitation record. The vendors are chosen based upon the commodity classes/sub-classes being purchased, the vendor selection codes and the geographic bid area codes. If the LaPAC Post field is "Y", the solicitation will also be posted to the LaPAC internet site. This is accomplished by the use of the SDOC screen.

### Inputs

- Required solicitation number
- Required status code

### Outputs

- Updated SDOC/SVEN Table

### Completing The Procedure

#### Cross-Reference

#### Steps

1. Perform normal solicitation processing. Determine solicitation to be printed in final for mailing.
2. Print and/or post final solicitation in AGPS.
  - a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER.
  - b. Type **INQUIRE** in the Function Line.
  - c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.
  - d. Press RETURN/ENTER. Requested solicitation vendor record should be displayed.
3. Type **CHANGE** in the Function Line.
  - a. Using the TAB key, move to Status Code field and type **355** or **360**.

### Cross-Reference

### Steps

NOTE: Status code 355 will result in on-line print and/or post of the final solicitation documents.

Status code 360 will result in over night print and/or post of the final solicitation documents.

A bidder's list can only be generated during a nightly. Therefore, on-line print of a final solicitation will not produce a bidder's list, and therefore would only print a solicitation to add-on vendors. If user wishes to print the final solicitation on-line, a draft solicitation should be done with status **350** in order to produce the bid list, and then the status could be set to **355** to print the final solicitation on-line.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

Before the solicitation is printed draft or final, AGPS will automatically consecutively renumber the solicitation lines. If multiple requisitions are attached to the solicitation, AGPS numbers all lines consecutively beginning at 1, therefore the solicitation line numbers for the second and subsequent requisitions will differ from the requisition line numbers. From this point forward, all AGPS references will be to the solicitation line numbers and not the requisition line number. The awarded contract or order will reference the solicitation line number and the solicitation line number will be printed on the contract or order.

## **7 AMENDING SOLICITATIONS**

When a solicitation needs to be changed, the buyer can prepare a change to the solicitation by creating a record in the solicitation amendment table (SAMD) and by adding text to the solicitation amendment text table (SATX). The buyer can change any aspect of the solicitation with the amendment including the bid opening date and time. A solicitation may be canceled in its entirety with an amendment. In some cases, the solicitation may need to be re-bid. For information on this process, see paragraph 8, Re-bid/Rework Solicitations below. When the amendment is printed in final, the revised bid opening date and time for the solicitation are updated automatically to reflect the new date and time.

Solicitation amendments may be printed in draft by setting the amendment status code to 350. Only one copy of the amendment is printed in draft. The buyer should review the draft amendment, make any corrections and reprint the draft if desired.

Solicitation amendments may be printed and/or posted in final form by setting the amendment status code to 360. A final amendment is printed for each active vendor on the solicitation bid list. If the original solicitation was posted, the amendment will automatically be posted to LaPAC.

Following are the details of the procedures to create a solicitation amendment, print draft amendment, obtain approvals and print and/or post final amendment.

### **7.1 Add Solicitation Amendment**

#### **Overview**

The AGPS user is provided the capability to add a solicitation amendment header in the system for processing change to an issued solicitation. The first step in issuing a solicitation amendment is to add an amendment header record in the solicitation amendment table. This is accomplished by the use of the SAMD screen.

#### **Inputs**

- Required solicitation number
- Required amendment number
- Required amendment type
- Required label request type

#### **Outputs**

- Updated SAMD Table

#### **Completing The Procedure**



# SOLICITATION PROCESSING

## PROCEDURES

### 7.1 Add Solicitation Amendment

Cross-Reference	Steps
	1. Determine solicitation to be amended.
SDOC 4: SDOC	<b>Solicitation Number</b> must be key to a valid and active solicitation record in the SDOC Table.
INST 4: BTAB	<b>Amendment Type Code</b> must be a valid entry in BTAB Table AM (Amendment Type).  <b>Label Request Type</b> must be a valid entry in BTAB Table LR (Label Request Type).
	2. Add SAMD record data into AGPS.
SDOC 4: SAMD	a. If the user is not in the SAMD screen, type <b>SAMD</b> in the Function Line and press RETURN/ENTER.  b. Type <b>CLEAR</b> in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and <b>ADD</b> inserted in the Function Line.  c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.  d. Using the TAB key, move to Amendment Number field and type desired amendment number.  e. Using the TAB key, move to Amendment Type Code field and type desired amendment type code.  f. Using the TAB key, move to Label Request Type field and type desired label request type.
	3. Press RETURN/ENTER.
	NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 7.2 Change Solicitation Amendment

**Overview** The AGPS user is provided the capability to change/maintain a solicitation amendment header in the system for processing change to an issued solicitation. The user may revise the bid opening date and/or time, indicate mailing label requirements, etc. This is accomplished by the use of the SAMD screen.

**Inputs**

- Required solicitation number
- Required amendment number
- Required change to amendment type
- Required change to status code
- Required change to advertisement required
- Required change to date advertised
- Required change to revised bid open date
- Required change to revised bid open time
- Required change to label request type
- Required change to labels needed
- Required change to labels number up

**Outputs**

- Updated SAMD/SDOC Table

### Completing The Procedure

#### Cross-Reference

#### Steps

1. Determine changes to solicitation amendment.

SDOC 4: SDOC

**Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table.

## SOLICITATION PROCESSING

## PROCEDURES

### 7.2 Change Solicitation Amendment

#### Cross-Reference

#### Steps

INST 4: BTAB

**Amendment Type Code** must be a valid entry in BTAB Table AM (Amendment Type).

**Label Request Type** must be a valid entry in BTAB Table LR (Label Request Type).

SDOC 4: SAMD

**Amendment Number**, combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table.

2. Change SAMD record data in AGPS.

SDOC 4: SAMD

a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

d. Using the TAB key, move to Amendment Number field and type desired amendment number.

e. Press RETURN/ENTER. Requested amendment record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Amendment Type Code field and type desired amendment type code.

b. Using the TAB key, move to Status Code field and type desired status code.

If ...	Then ...
Identifying solicitation amendment for supervisor review	Type status code = 301
Identifying solicitation amendment for buyer review	Type status code = 302
Printing a draft solicitation amendment (O/N)	Type status code = 350

## SOLICITATION PROCESSING

## PROCEDURES

### 7.2 Change Solicitation Amendment

#### Cross-Reference

#### Steps

If ...	Then ...
Printing a solicitation amendment (O/L)	Type status code = 355
Issuing a solicitation amendment (O/N)	Type status code = 360
Canceling solicitation amendment	Type status code = 396-399

- c. Using the TAB key, move to Advertisement Required field and type desired indicator. Allowable entries are **Y** and **N**.
- d. Using the TAB key, move to Date Advertised field and type desired date. Required if Advertisement Required is **Y**.
- e. Using the TAB key, move to Revised Bid Open Date field and type desired date. Date must be greater than existing solicitation scheduled or revised bid opening date.

NOTE: When solicitation amendment is processed to the vendor(s) the solicitation (SDO3) revised bid opening date will be updated with this date.

- f. Using the TAB key, move to Revised Bid Open Time field and type desired time.

NOTE: When solicitation amendment is processed to the vendor(s) the solicitation (SDOC) revised bid opening time will be updated with this time.

- g. Using the TAB key, move to Label Request Type field and type desired label request type.
- h. Using the TAB key, move to Labels Needed (Y/N) field and type desired indicator. Allowable entries are **Y** and **N**. Defaults to "N" if left blank.

## 7.10 Print/Issue And/Or Post Solicitation Amendment

### Overview

The AGPS user is provided the capability to print a draft solicitation amendment for review purposes in AGPS. When a buyer has prepared the solicitation amendment record in the desired manner, the next logical step is to print the solicitation amendment in draft form for review. The draft solicitation amendment may be printed by setting the status on the SAMD transaction to 350 for overnight. When the buyer has prepared the solicitation amendment in draft and is ready to print the final solicitation amendment, the final solicitation amendment may be printed by setting the status on the SAMD transaction to 355 for on-line or 360 for overnight. If the LaPAC Post field is Y, the solicitation amendment will also be posted to the LaPAC internet site.

### Inputs

- Required solicitation number
- Required solicitation amendment number

### Outputs

- Updated SAMD Table

### Completing The Procedure

#### Cross-Reference

#### Steps

- |              |  |
|--------------|--|
| SDOC 4: SDOC | 1. Perform normal solicitation amendment processing.   |
| SDOC 4: SAMD | <b>Solicitation Number</b> must be key to a valid and active solicitation record in the SDOC Table.                                |
| SDOC 4: SAMD | <b>Amendment Number</b> , combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table. |
| SDOC 4: SAMD | 2. Print and/or post solicitation amendment in AGPS.   |
|              | a. If the user is not in the SAMD screen, type <b>SAMD</b> in the Function Line and press RETURN/ENTER.                            |
|              | b. Type <b>INQUIRE</b> in the Function Line.   |
|              | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.                                      |
|              | d. Using the TAB key, move to Amendment Number field and type desired amendment number.  |

## SOLICITATION PROCESSING

## PROCEDURES

### 7.10 Print/Issue Solicitation Amendment

<u>Cross-Reference</u>	<u>Steps</u>
	<ul style="list-style-type: none"><li>e. Press RETURN/ENTER. Requested amendment record should be displayed.</li></ul>
	3. Type <b>CHANGE</b> in the Function Line. <ul style="list-style-type: none"><li>a. Using the TAB key, move to Status Code field and type <b>345/350 or 355/360</b>.</li></ul>
	NOTE: Status code 345 will result in on-line print of the draft solicitation amendment documents.  Status code 350 will result in overnight print of the draft solicitation amendment documents.  Status code 355 will result in on-line print and/or post of the solicitation amendment documents.  Status code 360 will result in overnight print and/or post of the solicitation amendment documents.
	4. Press RETURN/ENTER.  NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.  All active vendors on the bid list for the basic solicitation will receive a copy of the solicitation amendment if SAMD Label Request Type is <b>A</b> (All). After the final solicitation is issued, any vendors who casually pick up or request a copy of the solicitation will be added to the bid list. These vendors will automatically receive a copy of all amendments.

**SAMD****Solicitation Amendment**

ENTER FUNCTION:	TRANS: SAMD	DATE:
SOLICITATION AMENDMENT TABLE		TIME:
KEY IS SOLICITATION NUMBER AND SOLICITATION AMENDMENT		TERM:
SOLICITATION NUMBER:	:	
FILE NUMBER.....:		
AMENDMENT.....:		
AMENDMENT TYPE CODE:	:	
STATUS CODE.....:	:	
STATUS CHANGE DATE..:		
ADV REQUIRED.....:		
DATE ADVERTISED....:		
REV BID OPEN DATE...:		REV BID OPEN TIME...:
LABEL REQUEST TYPE..:	:	
WHIM.....:		POST TO LAPAC?.....:
DATE PRINTED.....:		
PURCHASING AGENCY...:	:	
BUYER.....:	:	
USER ID LAST CHANGE:		LABELS NEEDED (Y OR N)...:
DATE LAST CHANGED...:		LABELS NUMBER UP :.....:

**Purpose**

The purpose of the Solicitation Amendment table is to provide the user with the ability to add, change, delete, or inquire an amendment header record. This record provides the necessary information to link an amendment to a solicitation and maintain basic information about the amendment. Access is granted only to those solicitations for which the user has security access.

**Screen****Characteristics**

Add, Change, Delete and Inquire SAMD Table.

**Procedure****Cross-Reference**

Chapter 2 Solicitation Processing;

- 7.1 Add Solicitation Amendment
- 7.2 Change Solicitation Amendment
- 7.3 Delete Solicitation Amendment
- 7.4 Inquire Solicitation Amendment

**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Date	8	Protected. Maintained by system. Current date.
Time	8	Protected. Maintained by system. Current time.
Term	8	Protected. Maintained by system. Terminal ID logged on to transaction.
Solicitation Number	10	Unprotected. Key. Required. The number of the solicitation which will be amended.
Solicitation Title	40	Protected. The title of the solicitation as provided from the Solicitation table.
File Number	8	Protected. File Number carried forward from the first requisition attached to the solicitation.
Amendment	2	Unprotected. Key. Required. A sequential number provided by the user to identify the amendment. Amendment number may not be duplicated.
Amendment Type Code	3	Unprotected. Required. Identifies the type of amendment.
Amendment Type Title	30	Protected. An interpretation of the amendment type code as provided from BTAB Table AM (Amendment Type).
Status Code	3	Unprotected. Required. Must be 300 for add. If left blank on add, system will default to 300. Reflects the current status of the amendment and must be changed to allow further processing.
Status Code Title	30	Protected. An interpretation of the status code from BTAB Table SB (Status Code - Solicitation).
Status Change Date	8	Protected. The date the status code was last changed.
Adv Required	1	Unprotected. Required. Must be <b>Y</b> or <b>N</b> . If left blank on add, system will default to the advertisement required indicator of the original solicitation.
Date Advertised	8	Unprotected. If advertisement required equals <b>N</b> then date advertised must be blank. If advertisement required equals <b>Y</b> then date advertised must be valid date.



## SOLICITATION PROCESSING

## DOCUMENTS

### SAMD: Solicitation Amendment

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
Rev Bid Open Date	8	Unprotected. Optional. New bid opening date if applicable. If left blank original bid opening will remain. If input, must be greater than solicitation bid opening date.
Rev Bid Open Time	8	Unprotected. Optional. New bid opening time if applicable.
Label Request Type	1	Unprotected. Required. Identifies which vendors will receive the amendment (i.e., have mailing labels printed).
Label Req Type Title	30	Protected. An interpretation of the Label Indicator code as provided from BTAB Table LR (Label Request Type).
Whim	1	Unprotected. Optional entry. Used to indicate if this record may require an approval not covered by any prior approval.
Post to LaPAC?	1	Protected. Displays value from the SDOC record on add. Used to indicate if the solicitation amendment will be posted to LaPAC.
Date Printed	8	Protected. Automatically updated by the system when this amendment is printed.
Purchasing Agency	6	Protected. Purchasing agency as specified on the original solicitation.
Purchasing Agency Name	35	Protected. Name of the purchasing agency as provided from the Agency table.
Buyer	3	Protected. Buyer code as specified on the original solicitation.
Buyer Name	35	Protected. The name of the agency buyer as provided from the Agency Buyer table.
User ID Last Change	4	Protected. The user ID of the last user to change this record.
Labels Needed (Y or N)	1	Unprotected. <b>Y</b> = labels needed to mail out amendment.
Date Last Changed	8	Protected. The date the last change to this record was made.
Labels Number Up	1	Unprotected. Used to indicate the number of labels to print for each address.

**SASC      Solicitation Amendments By Status Code Table**

ENTER FUNCTION: ..... TRANS: SASC

SOLICITATION AMENDMENTS BY STATUS CODE TABLE  
KEY IS STATUS CODE, SOL NUM AND AMEND NUMDATE :  
TIME :  
TERM :

STATUS CODE.....: ... :

SOLICITATION	AMEND	TITLE	CHANGE DATE
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		
.....	..		

**Purpose**

The purpose of the Solicitation Amendments By Status Code table is to provide the user with a list of solicitations amendments by status code. Access is granted only to those solicitations for which the user has security access.

**Screen****Characteristics**

Inquire Solicitation Amendment Header Table.

**Procedure****Cross-Reference**

Chapter 2 Solicitation Processing,  
12.1 Inquire Solicitation Database Records.

**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Purchasing Agency	6	Unprotected. Key. If left blank the system will start the solicitation list with the first purchasing agency in the database. If input the system will return the list for the agency specified.
Purchasing Agency Title	35	Protected. The title of the purchasing agency.
Buyer Code	3	Unprotected. Key. If left blank the system will start the solicitation list with the first buyer for the purchasing agency specified. If input the system will return the list for the buyer code specified.
Buyer Name	35	Protected. The name of the buyer as provided in the Agency Buyer table.
Status	13x3	Unprotected. Key. If left blank the system will start the solicitation list with the smallest status code for the purchasing agency and buyer code specified. If input the system will return the list starting at the status code specified.
Solicitation	13x10	Unprotected. Key. If left blank the system will start the list with the first solicitation number for the status code, buyer code, and agency specified. If input the system will return the list starting at the solicitation number specified.
Solicitation Number Title	13x40	Protected. The title of the solicitation as provided from the Solicitation table.
Change Date	13x8	Protected. The date the solicitation was last changed.

**SDOC****Solicitation Header Table #1**

ENTER FUNCTION:		TRANS: SDOC		DATE: 02/23/01
SOLICITATION HEADER TABLE #1				TIME: 15:22:47
KEY IS SOLICITATION NUMBER				TERM: \$DO9
SOLICITATION NUMBER:				
FILE NUMBER .....	FISCAL YEAR:	DAYS BIDS	FIRM:	
TITLE LINE 1.....			DATE:	
TITLE LINE 2.....				
STATUS CODE.....	:		CHG DATE:	
DOCUMENT TYPE.....	:			
AWARD CODE.....	:		PRE-BID IND:	
SOLICITATION CODE..	:		#RFP COPIES:	
PURCHASING AGENCY..	:		LAPAC POST.:	
BUYER CODE.....	:			
DELIVERY DAYS ARO..	WEEKS ARO:	ALT DEL SCHEDULE:		
FOB POINT.....		COOP PROCUREMENT:		
SET-ASIDE CODE.....	:			
T-NUMBER.....	:		WHIM.....:	
EVALUATION TYPE....	:			
TYPE PRICE SHEET...	:		SPECIFY BRAND:	
TYPE BID TABULATION:	:			
ESTIMATED AMOUNT...	FIRST AWARD:	LAST AWARD:		

**Purpose**

The purpose of the Solicitation Header Table #1 is to provide the user with the ability to add, change, delete, or inquire solicitation header information. The primary function of SDOC is to add new header records in the creation of solicitation documents and to provide a method of monitoring the status so as to move the solicitation through the solicitation cycle. Security is based on the purchasing agency and access is granted only to those solicitations for which the user has security access.

**Screen****Characteristics**

Add, Change, Delete and Inquire SDOC Table.

**Procedure****Cross-Reference**

Chapter 2 Solicitation Processing;

- 1.1 Add Solicitation Header Table #1
- 1.2 Change Solicitation Header Table #1
- 1.3 Delete Solicitation Header Table #1

- 1.4 Inquire Solicitation Header Table #1
- 4.6 Generating Bid List Without Solicitation Print
- 4.7 Automatically Select Vendors
- 5.1 Solicitation Approval Processing
- 6.1 Print Draft Solicitation
- 6.2 Print/Issue and/or Post Final Solicitation
- 8.1 Re-Work Before Bids Are Opened
- 8.2 Re-Bid After Bids Have Been Issued/Opened
- 9.1 Prepare Solicitation To Record Bids
- 10.2 Select Bid Tabulation Type
- 10.4 Process Bid Tabulation Without Award
- 10.5 Process Bid Tabulation With Proposed Award
- 11.2 Partial Award Of A Solicitation
- 11.3 Partial Award/Re-Bid Of A Solicitation
- 11.4 Award Solicitation With Proposed Award
- 11.5 Award Solicitation Without Proposed Award
- 11.7 Re-Award Solicitation After Order Cancellation

**Field Completion**

<u>Field</u>	<u>Size</u>	<u>Description</u>
Date	8	Protected. Maintained by system. Current date.
Time	8	Protected. Maintained by system. Current time.
Term	8	Protected. Maintained by system. Terminal ID logged on to transaction.
Solicitation Number	10	Unprotected. Key. Required for inquiry, change, or delete. On add of a solicitation enter 'next'. If left blank on inquiry, the system will display the first record in the database.
File Number	8	Protected. File Number carried forward from the first requisition attached to the solicitation.
Fiscal Year	2	Protected. System maintained. Fiscal year is carried forward from requisition attached to the solicitation.
Days Bids Firm	3	Unprotected. Required. The number of days the vendor is requested to keep the bid firm.
Title Line 1	40	Unprotected. Required. Should be used to assign a title which describes the general nature of the solicitation and would be recognized by the user.
Date	8	Protected. System maintained. Date the solicitation was created.
Title Line 2	40	Unprotected. Optional entry. May be used to extend the description if line 1 is not enough space.
Status Code	3	Unprotected. Optional entry. On add entry must be <b>300</b> . If left blank on add, will default to <b>300</b> . If entered, must be a valid entry in BTAB Table SB (Status Solicitation)
Status Code Title	30	Protected. Interpretation of status code from BTAB Table SB.
Chg Date	8	Protected. System maintained. Date status was last changed.
Document Type	3	Protected. System will default to 'UNK' on add. When first requisition is attached, the system will assign the proper document type based on the solicitation and award codes.
Document Type Title	30	Protected. Interpretation of the document type from BTAB Table DS (Document Type Solicitation).

## SOLICITATION PROCESSING

## DOCUMENTS

### SDOC: Solicitation Header Table #1

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
Award Code	1	Protected. Award code carried forward from the first requisition attached to the solicitation.
Award Code Title	30	Protected. Interpretation of the obligation code from BTAB Table OC (Award Code).
Pre-Bid Ind	1	Protected. Pre-bid indicator carried forward from the SDO2 screen.
Solicitation Code	1	Protected. Solicitation code carried forward from the first requisition attached to the solicitation.
Solicitation Code Title	30	Protected. Interpretation of the procurement code from BTAB Table PR (Solicitation Code).
#RFP Copies	2	Unprotected. Optional entry. Default is = 01. This is used to indicate the number of EXTRA copies to be produced for the print process.
Purchasing Agency	6	Unprotected. Required. Entry must be a valid record in the AGCY Table. Identifies the agency responsible for the purchase function of the solicitation process.
Purchase Agency Name	35	Protected. Inferred agency name from the AGCY Table.
LaPAC Post	1	Unprotected. Defaults to "N" on add if spaces. Used to indicate if solicitation will be posted to the web via LaPAC. AGENCY LaPAC Post? field must be Y for purchasing agency.
Buyer Code	3	Protected. Buyer code carried forward from the first requisition attached to the solicitation.
Buyer Name	35	Protected. Inferred name of the buyer from the ABUY Table.
Delivery Days ARO	3	Unprotected. Optional. Indicates the period of time after receipt of the order by the vendor that delivery is to be made. If Weeks ARO is entered, this entry must be blank.
Weeks ARO	3	Unprotected. Optional. Indicates the period of time after receipt of the order by the vendor that delivery is to be made. If Days ARO is entered, this entry must be blank.
Alt Del Schedule	1	Unprotected. Required. Will default to N on add. Used to indicate an alternate delivery schedule will be used. Entry is Y or N.

## SOLICITATION PROCESSING

## DOCUMENTS

### SDOC: Solicitation Header Table #1

#### Field Completion

<u>Field</u>	<u>Size</u>	<u>Description</u>
FOB Point	25	Unprotected. Optional. Point at which acceptance of delivery will be effected. If left blank, system will default to 'destination'.
Coop Procurement	1	Unprotected. Optional. Will default to <b>N</b> . Used to indicate if the procurement may be used to satisfy the needs of an agency other than a state agency. Entry is <b>Y</b> or <b>N</b> .
Set Aside Code	2	Unprotected. Optional. Used to indicate to the system that only the vendors meeting the set aside criteria may be selected for solicitation. If left blank on add, system will default to 'none' (N).
Set Aside Code Title	30	Protected. Interpretation of the set aside code from BTAB Table SA (Set Aside Type).
T-Number	5	Unprotected. Optional. Tracking number carried forward from the attached requisition.
T-Number Title	30	Protected. Interpretation of the T-Number from BTAB Table TA (T-Number).
Whim	1	Unprotected. Optional entry. Used to indicate if this record may require an approval not covered by any prior approval.
Evaluation Type	2	Unprotected. Optional. Used to indicate if the bid evaluation will be 'buyer', 'user', or 'other'.
Evaluation Type Title	30	Protected. Interpretation of the evaluation type code from BTAB Table ET (Evaluation Type).
Type Price Sheet	1	Unprotected. Optional. Used to identify the price sheet type for the solicitation. If left blank, system will default to '1'.
Type Price Sheet Title	30	Protected. Interpretation of the price sheet type code from BTAB Table PS (Price Sheet Type).
Specify Brand	1	Unprotected. Defaults to 'Y'. Will print the text 'SPECIFY BRAND(and number if applicable)_____ ' beneath each non-service commodity on the solicitation.
Type Bid Tabulation	1	Unprotected. Required. Used to describe to the system the type of bid tabulation desired. System will automatically sort the vendor's bid prices according to the type bid tabulation specified here or at the requisition line.



### 9.3 Inquire Inventory Center Item Orders

Inventory Control Sub-System not in use.

**Overview** The AGPS user is provided the capability to inquire inventory center item orders in the order database. This is accomplished by use of the OFST screen.

**Inputs**

- Required order number
- Required order line number
- Required order accounting distribution number

**Outputs**

- Display of requested ORDR/OLIN/OACG Table record(s)

#### Completing The Procedure

##### Cross-Reference

##### Steps

- |              |    |  |
|--------------|----|--|
|              | 1. | Determine inventory center item order to be inquired.  |
| ORDR 4: OFST |    | <b>Order Number</b> must be key to a valid inventory center item order record in the ORDR Table.   |
| ORDR 4: OFST |    | <b>Line Number</b> must be key to a valid inventory center item order line record in the OLIN Table.   |
| ORDR 4: OFST |    | <b>Acct Dist Number</b> must be key to a valid inventory center item order accounting distribution record in the OACG Table.   |
|              | 2. | Inquire inventory center item Order Header Table record.   |
| ORDR 4: OFST | a. | Inquire order header using procedures of 1.7 Inquire Fast Order Entry Record(s) above using desired inventory center item order number.                                    |
|              | 3. | Inquire inventory center item Order Line Table record.   |
| ORDR 4: OFST | a. | Inquire order line using procedures of 1.7 Inquire Fast Order Entry Record(s) above and desired order line number.   |
|              | 4. | Inquire inventory center item Order Accounting Distribution Table record.  |
| ORDR 4: OFST | a. | Inquire order accounting distribution table record using procedures of 1.7 Inquire Fast Order Entry Record(s) above and desired order accounting distribution line number. |

## 10. PRINT ORDERS

### 10.1 How To Print Orders

**Overview** The AGPS user is provided the capability to identify orders for printing in AGPS. This is accomplished by the use of the ORD4/OFST screen.

**Inputs**

- Required order number
- Required status code

**Outputs**

- Updated ORDR Table
- Printed order document(s)

#### Completing The Procedure

##### Cross-Reference

##### Steps

1. Determine orders to be printed.
  2. Print orders in AGPS.
    - a. Change order header status using procedures of 1.2 Change Order Header Table above. Or,
    - b. Change order header status using procedures of 1.6 Change Fast Order Entry Record(s) above.
- ORDR 4: ORD4
- ORDR 4: OFST

**440** - Print order on-line to remote printer.

**NOTE: If the CONFIRM field is Y or R, status code 440 must be used to print the order. Status 450 does not build the receipt, invoice, and payment records.**

**450** - Print order during nightly batch order print if remote printer not available.

**NOTE:** Nightly batch order print program will determine those orders that will result in printed order documents.

If SDOC LaPAC Post field is Y, a 440 or 450 status will post award information to LaPAC.

## 11.3 Inquire SUB Order Changes

**Overview** The AGPS user is provided the capability to inquire SUB order changes in the order change database. This is accomplished by use of the OCHG and OCAC screens.

**Inputs**

- Required order number
- Required order change number
- Required order change order accounting distribution number

**Outputs**

- Display of requested OCHG/OCAC Table record(s)

### Completing The Procedure

#### Cross-Reference

#### Steps

- |               |    |   |
|---------------|----|---|
|               | 1. | Determine SUB order change to be inquired.  |
| ORDR 4: ORDR4 |    | <b>Order Number</b> must be key to a valid and active order record in the ORDR Table.   |
| OCHG 4: OCHG  |    | <b>Change Number</b> , combined with the order number, must be key to a valid and active order change record in the OCHG Table.   |
| OCHG 4: OCAC  |    | <b>Accounting Distribution Number</b> , combined with the order number and change number, must be key to a valid and active order change order accounting distribution line record in the OCAC Table. |
|               | 2. | Inquire SUB Order Change Table record.  |
| OCHG 4: OCHG  | a. | Inquire order change using procedures of 1.3 Inquire Order Change Table above using desired inventory center item order number and change number.   |
|               | 3. | Inquire SUB Order Change Order Accounting Distribution Table record.  |
| OCHG 4: OCAC  | a. | Inquire order change order accounting distribution table record using procedures of 3.4 Inquire Order Change Order Accounting Distribution Table above.   |

## 12. PRINT ORDER CHANGES

### 12.1 How To Print Order Changes

**Overview** The AGPS user is provided the capability to identify order changes for printing in AGPS. This is accomplished by use of the OCHG screen.

**Inputs**

- Required order number
- Required order change number
- Required status code

**Outputs**

- Updated OCHG Table
- Printed order change document(s)

#### Completing The Procedure

##### Cross-Reference

##### Steps

1. Determine order changes to be printed.
2. Print order changes in AGPS.

##### OCHG 4: OCHG

- a. Inquire desired order change header record using the procedures of 1.3 Inquire Order Change Table above.
- b. Change order change status using procedures of 1.2 Change Order Change Table above.

**440** - Print order change on-line to remote printer.

**450** - Print order change during nightly batch order print if remote printer not available.

NOTE: If SDOC LaPAC Post is Y, award information will be updated in LaPAC on INC, DEC, CNL, and CNX document types.

## **7 ADD/CHANGE CONTRACT APPROVAL RECORDS**

### **7.1 Contract Approval Processing**

#### **Overview**

The AGPS user is provided the capability to add/change and/or approve contract approval records. The system is designed to automatically create all required contract approvals when a change is processed for the contract header record. The user also has the capability to manually add any additional approvals deemed necessary for processing of the contract document. This is accomplished with KONT and PAPV.

#### **Inputs**

- Required contract number
- Required conditions to invoke an approval
- Required input data for a manual approval

#### **Outputs**

- Updated PHLD/PAPV Table

#### **Completing The Procedure**

##### Cross-Reference

##### Steps

1. Perform normal contract processing.
2. Add/Change Contract Header Table record approvals.
  - a. Add KONT, using procedures of 1.1 Add Contract Header Records above, contract header purchasing agency and/or whim indicator.
  - b. Change KONT, using procedures of 1.2 Change Contract Header Records above, contract header purchasing agency and/or whim indicator.
3. Change , using procedures of 1.2 Change Contract Header Records above, contract status to greater than 524 and less than 596.

NOTE: On successful change of contract header status greater than 524, all required contract header approvals will be moved to the PAPV Table for processing. See Section 13, Electronic Approvals Processing.
4. Manually add order approval record(s). See Section 13, Electronics Approval Processing, Chapter 2, 4 ADD/CHANGE MANUAL APPROVAL RECORDS.

## 8 MAINTAIN CONTRACT NON-SYSTEM USAGE

### 8.1 Change Contract Non-System Usage

**Overview** The AGPS user has the capability to maintain contract non-system usage reported by agencies not using AGPS. This is accomplished by use of the KLU3 screen.

**Inputs**

- Required contract number
- Required contract line number
- Required fiscal year
- Required contract unit of measure

**Outputs**

- Updated KLU3 Table

### Completing The Procedure

<u>Cross-Reference</u>	<u>Steps</u>
	1. Determine contract line record for which usage is to be recorded.
KONT 4: KONT	<b>Contract Number</b> must be a valid and active contract record in the KONT Table.
	<b>Fiscal Year</b> must be a valid fiscal year for the contract number indicated.
KONT 4: KLI2	<b>Line Number</b> must be a valid and active contract line in the KLI2 Table for the contract indicated.
	<b>Unit of Measure</b> must be a valid unit of measure for the line number indicated.
	2. Change contract usage records in AGPS.
KONT 4: KLU3	a. If user is not in the KLU3 screen, type <b>KLU3</b> in the Function Line and press RETURN/ENTER.
	b. Type <b>INQUIRE</b> in the Function Line.
	c. Using the TAB key, move to Contract Number field and type desired contract number.

**A043E AGENCY RCD NOT ACTIVE**

**CAUSE:** The input Agency number is not key to an active record (Status Code = 1) in the AGCY table.

**SOLUTION:** Enter an Agency Number that is key to an active record in the AGCY Table.

**A044E SUB-AGCY NUMBER INVALID**

**CAUSE:** Entered Sub-Agency, combined with the Agency number, is not key to a valid record in the AADR table.

**SOLUTION:** Enter Sub-Agency, combined with the Agency number, that is key to a valid record in the AADR table.

**A045E SUB-AGCY AADR RCD NOT ACTIVE**

**CAUSE:** Entered Sub-Agency, combined with the Agency number, is not key to an active record (Status = 1) in the AADR table.

**SOLUTION:** Enter Sub-Agency, combined with the Agency number, that is key to an active record in the AADR table.

**A046E NUMBER OF COPIES NOT VALID**

**CAUSE:** The Number of Copies is not numeric.

**SOLUTION:** Enter Number of Copies as numeric and positive (greater than '0').

**A047E T - NUMBER IS INVALID**

**CAUSE:** The T - Number (Contract Tracking Number) is not equal to a valid entry in BTAB Table 'TA' (T - Number).

**SOLUTION:** Enter T - Number (Contract Tracking Number) that is equal to a valid entry in BTAB Table 'TA' (T - Number).

**A048E AGCY AND ANOA # OF COPIES = 0**

**CAUSE:** The AGCY Number of Notices is '0', and the Copies field is not greater than '00'.

**SOLUTION:** Enter Number of Copies.

**A049E AGENCY GROUP NUMBER IS INVALID**

CAUSE: The Agency Group is not equal to a valid entry in BTAB Table 'AG' (Agency Group).

SOLUTION: Enter Agency Group that is equal to a valid entry in BTAB Table 'AG' (Agency Group).

**A050E GROUP CODE MUST BE GRPXX**

CAUSE: The Group Code format is not 'GRPxx'.

SOLUTION: Enter Group Code format that is 'GRPxx'.

**A052E APPROVAL LEVEL IS NOT NUMERIC**

CAUSE: Approval Level is greater than spaces and is not numeric.

SOLUTION: Enter numeric Approval Level.

**A080E LAPAC POST NOT Y OR N**

CAUSE: Entered a value not equal to 'Y' or 'N' in the LAPAC POST? field on AGCY.

SOLUTION: Enter a value equal to 'Y' or 'N'.

**A081E LAPAC POST? REQ 6 POS AGCY**

CAUSE: Entered a 3 position agency number and the LAPAC POST? field is greater than spaces on AGCY.

SOLUTION: Enter a 6 position agency number.

**A099E RECORD NOT FOUND IN TABLE**

CAUSE: Key to the Record can not be found in the Table.

SOLUTION: Enter a valid key.

**A113E AGENCY NUMBER IS INVALID**

CAUSE: The Agency Number is not key to a valid record in the AGCY table.

SOLUTION: Enter an Agency Number that is key to a valid record in the AGCY table.



**A114E AGCY BUYER CODE IS REQUIRED**

CAUSE: The Buyer Code is not greater than spaces.

SOLUTION: Enter Buyer Code.

**A115E AGENCY BUYER NAME REQUIRED**

CAUSE: The Buyer Name is not greater than spaces.

SOLUTION: Enter Buyer Name.

**A116E BUYING UNIT IS REQUIRED**

CAUSE: The Buying Unit is not greater than spaces.

SOLUTION: Enter Buying Unit.

**A117E COMMERCIAL PHONE NBR INVALID**

CAUSE: Area Code, Prefix and Number are not numeric.

SOLUTION: Enter a numeric Commercial Phone Number.

**A118E BUYER SUPERVISOR CODE INVALID**

CAUSE: The Buyer Supervisor Code is not key to a valid buyer code in the ABUY table.

SOLUTION: Enter a Buyer Supervisor Code that is key to a valid buyer code in the ABUY table.

**A119E UNIT SUPERVISOR CODE INVALID**

CAUSE: The Unit Supervisor Code is not key to a valid buyer code in the ABUY table.

SOLUTION: Enter Unit Supervisor Code that is key to a valid buyer code in the ABUY table.

**A120E STATE PHONE NUMBER INVALID**

CAUSE: Area Code, Prefix and Number are not numeric.

SOLUTION: Enter numeric State Phone Number.

**A121E SOLIC APPRVL LIMIT NOT NUMERIC**

CAUSE: The Solicitation Approval Limit is not numeric.

SOLUTION: Enter numeric Solicitation Approval Limit, may be '0'.

**A122E AWARD APPRVL LIMIT NOT NUMERIC**

CAUSE: The Award Approval Limit is not numeric.

SOLUTION: Enter numeric Award Approval Limit, may be '0'.

**A123E AMENDMENT LIMIT NOT NUMERIC**

CAUSE: The Amendment Limit is not numeric.

SOLUTION: Enter numeric Amendment Limit, may be '0'.

**A124E CHG LIMIT NOT NUMERIC**

CAUSE: The Change Limit is not numeric.

SOLUTION: Enter numeric Change Limit, may be '0'.

**A125E STATUS CODE IS INVALID**

CAUSE: The Status Code is not equal to a valid entry in BTAB Table 'BS' (Buyer Status Code).

SOLUTION: Enter Status Code that is equal to a valid entry in BTAB Table 'BS' (Buyer Status Code).

**A126E CANNOT CHANGE STATUS CODE TO 0**

CAUSE: The user can not change the Status Code to '0' from a Status greater than '0'.

SOLUTION: Do not change Status Code from greater than '0' to '0'.

**A127E CANNOT DELETE STATUS NOT '0'**

CAUSE: The Status must be '0' for DELETE.

SOLUTION: Verify Status is '0' before attempting to DELETE.

**A128E BUYING UNIT INVALID**

CAUSE: The Buying Unit is not equal to a valid entry in BTAB Table 'AB' (Agency Buying Unit).

SOLUTION: Enter a Buying Unit that is equal to a valid entry in BTAB Table 'AB' (Agency Buying Unit).

**A129E SOL APP LIM NO DECIMAL ALLOWED**

CAUSE: The Solicitation Approval Limit is not a whole number (no decimal).

SOLUTION: Enter whole dollars only, no decimal.

**A130E AWD APP LIM NO DECIMAL ALLOWED**

CAUSE: The Award Approval Limit is not a whole number (no decimal).

SOLUTION: Enter whole dollars only, no decimal.

**A131E AMEND LIMIT NO DECIMAL ALLOWED**

CAUSE: The Amendment Limit is not a whole number (no decimal).

SOLUTION: Enter whole dollars only, no decimal.

**A132E CHG LIMIT NO DECIMAL ALLOWED**

CAUSE: The Change Limit is not a whole number (no decimal).

SOLUTION: Enter whole dollars only, no decimal.

**A133E PARISH CODE REQUIRED**

CAUSE: The State Code is equal to 'LA' and the Parish Code is spaces.

SOLUTION: Enter Parish Code equal to a valid entry in BTAB Table 'CC' (Parish Code).

**A135E AGCY NBR/WHSE CODE IS INVALID**

CAUSE: The Agency Number is not a valid record in the AGCY table, or a valid Warehouse Code in AFS.

SOLUTION: Enter a valid Agency Number.

**A136W ACCT TYPE FOR WAREHOUSE FUND**

CAUSE: The Account Type entered is for a Warehouse Fund.

SOLUTION: Since this is a warning, no action is required if the Agency Number designates a warehouse.

**A137W CODES NOT VALIDATED IN ACCT**

CAUSE: Routine warning that the entered accounting distribution codes were not validated in accounting.

SOLUTION: Since this is a warning, no action is required if the codes are valid in accounting (AFS).

**A138W USE ACCT TYPE D FOR WAREHOUSE**

CAUSE: The entered Agency Number is for a warehouse, so the Acct Type should be 'D'.

SOLUTION: Enter 'D' in the Acct Type.

**E814W PAYMENT FAIL IN ACCOUNTS**

CAUSE: Entered change to status code to encumber the OPAY record and encumbrance failed with '637' status.

SOLUTION: Check OPAG for Reason Codes that caused the encumbrance to fail. Make the necessary corrections and reprocess the OPAY record.

**E815E UNIT PRICE NOT REQUIRED**

CAUSE: Unit Price on order line (OLIN) > 0 and No Cost Indicator = 'Y'.

SOLUTION: Enter the order line and leave unit price blank.

**E815W PAYMENT CANCEL IN ACCOUNTS**

CAUSE: Entered change to status code to cancel the OPAY record.

SOLUTION: Warning message indicating the cancellation was successful.

**E816E CATALOG # REQUIRED**

CAUSE: Entered contract release order and left the catalog number blank.

SOLUTION: Enter catalog number, using order line with the KLIN no cost = 'N', % discount off = '0', unit price is equal to '0'.

**E817E CATALOG \$ REQUIRED**

CAUSE: Entered contract release order and left the catalog amount blank.

SOLUTION: Enter catalog number and catalog price, using order line with the KLIN no cost = 'N', % discount off = '0', unit price is equal to '0'.

**E818E MUST USE 'N' OR 'NEXT' ON ADD**

CAUSE: Entered invalid value in the requisition or order number field when creating new record.

SOLUTION: Enter either 'N' or 'Next' in the requisition or order number field when creating a new record.

**E820E ORDER CHANGE NOT ISSUED**

CAUSE: Entered status code '490' to manually close the order change and the order change has not been printed.

SOLUTION: Enter '496' or '497' to cancel the order change.

**E821E INVALID SHIP-TO SUB AGENCY**

CAUSE: Entered Ship-To Sub Agency not found in AADR table.

SOLUTION: Enter a valid and active ship-to sub agency from AADR table.

**E822E SHIP-TO SUB AGENCY NOT ACTIVE**

CAUSE: Entered an inactive Ship-To Sub Agency.

SOLUTION: Enter a valid and active (S/C 1) ship-to sub agency.

**E823E ERROR READING KONT TABLE**

CAUSE: An error has occurred in reading the KONT table.

SOLUTION: Stop processing! ☞Contact the ISIS Help Desk for assistance.

**E823W READY FOR MORE COMMODITY DATA**

CAUSE: Warning message indicating the user may enter additional requisition or order lines to the record created or changed.

SOLUTION: Enter additional requisition or order lines to record.

**E825E ERROR UPDATING KONT TABLE**

CAUSE: An error has occurred in updating the KONT table.

SOLUTION: Stop processing! ☞Contact the ISIS Help Desk for assistance.

**E826E ERROR GHU OINV RECORD**

CAUSE: An error has occurred in reading of table in OINV work area.

SOLUTION: Stop processing! ☞Contact the ISIS Help Desk for assistance.

**E827E CONTRACT NOT = ORDR CONTRACT**

CAUSE: Entered receipt and the contract number is not equal to order number.

SOLUTION: Enter valid contract number associated with order number.

**E830E MUST PRINT, SDOC ON LAPAC**

CAUSE: Entered an 'N' in the PRINT FIELD on ORD4 and the LAPAC POST field on SDOC is 'Y'.

SOLUTION: Must enter a 'Y' in the print field if the LAPAC POST field on SDOC is 'Y'.

**E830W VERIFY SCHED PAY DATE**

CAUSE: Entered change to OPAY record and the system is asking the user to verify if the scheduled pay date is correct.

SOLUTION: Warning message asking the user to insert 'Y' or 'N' verifying the scheduled pay date.

**S158E CONF CODE 3 MUST NOT BE SPACES**

CAUSE: Time and Location for Conference 3 have been entered, but Conference 3 Code and Conference 3 Date have been left blank.  
SOLUTION: Enter Conference 3 Code and Conference 3 Date, or space out Time and Location.

**S161E REQ MUST CONTAIN BUYER CODE**

CAUSE: Entered requisition Buyer Code is spaces.  
SOLUTION: Update requisition Buyer Code, then attach RQSN.

**S162E SEQUENCE NUMBER IS INVALID**

CAUSE: Entered Sequence Number is not numeric.  
SOLUTION: Enter numeric Sequence Number.

**S163E CONF 2 DATE CAN'T BE < CUR DTE**

CAUSE: Entered Conference 2 date is less than current date.  
SOLUTION: Enter date equal to or greater than current date.

**S164E CONF 3 DATE CAN'T BE < CUR DTE**

CAUSE: Entered Conference 3 date is less than current date.  
SOLUTION: Enter date equal to or greater than current date.

**S165E CONF 1 DATE CAN'T BE < CUR DTE**

CAUSE: Entered Conference 1 date is less than current date.  
SOLUTION: Enter date equal to or greater than current date.

**S167E REPROCUREMENT DATE INVALID**

CAUSE: Entered Reprocurement Date is invalid or is not in a valid date format.  
SOLUTION: Enter valid Reprocurement Date as MMDDYY or MM/DD/YY.

**S168E REPRO. DATE MST BE > CURRENT**

CAUSE: Entered Reprocurement Date is less than or equal current date.  
SOLUTION: Enter date greater than current date.

**S169E FINAL AWARDED - CAN'T CHG STAT**

CAUSE: SDOC Award Date greater than '0' and status is changed.  
SOLUTION: NONE - Cannot update awarded solicitation.

**S170E BID NOT ISSD-MAIL BID CAN'T = Y**

CAUSE: SDOC Bid Issued date is '0' and Mailed Bid indicator is changed to 'Y'.  
SOLUTION: None - Cannot change indicator to 'Y'.

**S171E MAILED BID IND MUST BE Y OR N**

CAUSE: Entered Mailed Bid indicator is not 'Y' or 'N'.  
SOLUTION: Enter Mailed Bid indicator equal 'Y' or 'N'.

**S172E MAIL BID CAN'T CHG FROM Y TO N**

CAUSE: The solicitation has been issued (status > or equal 361) and Mailed Bid indicator is changed to other than 'Y'.  
SOLUTION: Can't change Mailed Bid indicator except to 'Y'.

**S173E BID NOT YET MAILED**

CAUSE: The solicitation has not been issued (status < 361) and Status is changed to '2' or '8'.  
SOLUTION: Change Status to '1' or '7'.

**S175W MIN ORDER AMT > SOL EST AMT**

CAUSE: Entered Minimum Order Amount is greater than SDOC Estimated Amount.  
SOLUTION: This is a Warning and no action is required.

**S176E LAPAC POST MUST BE Y OR N**

CAUSE: Entered a value not equal to 'Y' or 'N' in the LAPAC POST field on SDOC.  
SOLUTION: Enter a value equal to 'Y' or 'N'.

**S176W CONF CD BLANK-ALL FLDS BLANKED**

CAUSE: Function is CHANGE, and all fields are blank.  
SOLUTION: This is a Warning and no action is required.



**S177E RECORD STATUS IS INACTIVE**

CAUSE: Function is CHANGE and status code is '7', '8' or '9'.

SOLUTION: NONE - Cannot update an active record. If record must be updated, change status first, and then update record.

**S180E MSTR BID RTN INVLD FOR STATUS**

CAUSE: Status Code is '0' and entered Master Bid Return Code is greater than '00'.

SOLUTION: Update Status to greater than '0', and then enter the Master Bid Return Code.

**S200E INVALID SOLICITATION NUMBER**

CAUSE: Entered Solicitation Number is not key to a valid record in the SDOC Table.

SOLUTION: Enter Solicitation Number that is key to a valid record in the SDOC Table.

**S201E SOLICITATION NOT ACTIVE**

CAUSE: Entered Solicitation Number is not key to an active record in the SDOC Table.

SOLUTION: Enter Solicitation Number that is key to an active record in the SDOC Table.

**S202E SOLICITATION NOT YET ISSUED**

CAUSE: Entered Solicitation Number has not been issued (status < 361).

SOLUTION: Update the Solicitation and process it. A solicitation amendment is not necessary.

**S203E STATUS CODE NOT 300**

CAUSE: Function is ADD and Status is not '300'.

SOLUTION: Leave Status spaces or enter '300'.

**S204E AMENDMENT NUMBER NOT NUMERIC**

CAUSE: Entered Amendment Number is not numeric.

SOLUTION: Enter numeric Amendment Number.

**S205E AMENDMENT TYPE CODE INVALID**

CAUSE: Entered Amendment Type Code is not equal to a valid entry in BTAB Table 'AM' (Amendment Type).

SOLUTION: Enter Amendment Type Code equal to a valid entry in BTAB Table 'AM'.

**S206E STATUS CODE IS INVALID**

CAUSE: Entered Status Code is not equal to a valid entry in BTAB Table 'SB' (Status Code - Solicitation).

SOLUTION: Enter Status Code equal to a valid entry in BTAB Table 'SB'.

**S207E ADV REQUIRED NOT Y OR N**

CAUSE: Entered Adv Required is not 'Y' or 'N'.

SOLUTION: Enter Adv Required equal 'Y' or 'N'.

**S208E DATE ADV MUST BE BLANK**

CAUSE: ADV Required is 'N' and Date Advertised has been entered.

SOLUTION: Space out the Date Advertised.

**S209E DATE ADVERTISED INVALID**

CAUSE: Entered Date Advertised is not a valid date or not in a valid date format.

SOLUTION: Enter valid Date Advertised as MMDDYY or MM/DD/YY.

**S210E REV BID OPEN DATE IS INVALID**

CAUSE: Entered Revised Bid Open Date is not a valid date or not in a valid date format.

SOLUTION: Enter valid Rev Bid Open Date as MMDDYY or MM/DD/YY.

**S211E AGCY NOT AUTHORIZED TO POST**

CAUSE: Entered 'Y' in the LAPAC POST field on SDOC and the LAPAC POST? field on AGCY for the SDOC Purchasing Agency is equal to 'N'.

SOLUTION: Agency is not authorized to post solicitations to LaPAC as indicated by the LAPAC POST? field on AGCY.

**S212E HIST RECORD NOT ADDED**

CAUSE: On ADD of SAMD or change of SAMD Amendment Type, the HIST Table update failed.

SOLUTION: Contact the ISIS Help Desk for assistance.

**S213E HDET RECORD NOT ADDED**

CAUSE: On ADD of SAMD or change of SAMD Status, the HDET Table update failed.

SOLUTION: Contact the ISIS Help Desk for assistance.

**S214E ADV REQUIRED NOT Y, N OR SPACES**

CAUSE: Entered Adv Required is not 'Y', 'N' or spaces.

SOLUTION: Enter Adv Required equal to 'Y', 'N' or spaces.

**S215E HIST RECORD NOT DELETED**

CAUSE: On DELETE, the HIST Table update failed.

SOLUTION: Contact the ISIS Help Desk for assistance.

**S216E LAPAC POST ALREADY PROCESSED**

CAUSE: Entered an 'N' in the LAPAC POST field on SDOC after previously posting the solicitation.

SOLUTION: Enter a 'Y' in the LAPAC POST field. (Once a solicitation is posted from AGPS to LaPAC, all rebids must be posted.

**S217E CANNOT DEL--STAT CODE NOT 300**

CAUSE: Function is DELETE and Status is greater than '300'.

SOLUTION: Cannot DELETE. Change Status to '396-399' to cancel.

**S218E LABEL INDICATOR INVALID**

CAUSE: Entered Label Indicator is not equal to a valid entry in BTAB Table 'LR' (Label Request Type).

SOLUTION: Enter Label Indicator equal to a valid entry in BTAB Table 'LR'.

**S219E NUMBER-UP MUST BE NUMERIC > 0**

CAUSE: Label Indicator is 'Y' and entered Number-Up is not numeric and greater than '0'.

SOLUTION: Enter numeric Number-Up greater than '0'.

**S220E PERF BOND % AND AMT SHOULD = 0**

CAUSE: Performance Bond Required is 'Y', Bond % or Amount is greater than '0' and Performance Bond Required is changed to 'N'.

SOLUTION: Update Bond % or Amount to '0'.

**S221E ERROR REPX RLIN/CALL PROGRAMMER**

CAUSE: On ADD of SRQN the RLIN update process failed.

SOLUTION: Contact the ISIS Help Desk for assistance.

**S222E NBR LABEL UP MST BE 1 2 3 OR 4**

CAUSE: Label Indicator is 'Y' and entered Number-Up is not '1', '2', '3', or '4'.

SOLUTION: Enter '1', '2', '3', or '4'.

**S223E CAN'T LAPAC POST TELEPHONE BID**

CAUSE: Entered a 'Y' in the LAPAC POST field on SDOC and the SOLICITATION CODE on RQS2 is T.

SOLUTION: Enter an 'N' in the LAPAC POST field. (Telephone bids may not be posted to LaPAC.)

**S224E STAT CODE IS INVALID (XS TYPE)**

CAUSE: Entered Status Code is a system set Status Code and can not be entered by the user.

SOLUTION: Do not enter Status Code equal to a status in BTAB Table 'XS'(Improper Status - Solicitation).

**S225E CANNOT CHG REC WITH THIS STAT**

CAUSE: Function is CHANGE and the Solicitation Amendment has been issued (status > '360').

SOLUTION: If the change is required, prepare and issue another Solicitation Amendment.

**S226E CAN'T CHG LAPAC POST STAT >325**

CAUSE: Entered a 'Y' in the LAPAC POST field on SDOC and the status is greater than 325.

SOLUTION: Change status to less than 325, then change LAPAC POST flag to 'Y'.

**S301E CONFERENCE 1 CODE INVALID**

CAUSE: Entered Conference 1 Code is not equal to a valid entry in BTAB Table 'TC' (Type Conference).

SOLUTION: Enter Conference 1 Code equal to a valid entry in BTAB Table 'TC'.

**S302E CONFERENCE 1 DATE REQUIRED**

CAUSE: Conference 1 Code has been entered and Conference 1 Date is equal to '0'.

SOLUTION: Enter Conference 1 Date.

**S303E CONFERENCE 1 DATE INVALID**

CAUSE: Entered Conference 1 Date is invalid or not in a valid date format.

SOLUTION: Enter valid Conference 1 Date as MMDDYY or MM/DD/YY.

**S304E CONFERENCE 1 TIME REQUIRED**

CAUSE: Conference 1 Date has been entered and Conference 1 Time is equal to spaces.

SOLUTION: Enter Conference 1 Time.

**S305E CONFERENCE 1 LOC REQUIRED**

CAUSE: Conference 1 Code has been entered and Conference 1 Location Line 1 equal to spaces.

SOLUTION: Enter Conference 1 Location Line 1.

**S306E CONFERENCE 2 CODE INVALID**

CAUSE: Entered Conference 2 Code is not equal to a valid entry in BTAB Table 'TC' (Type Conference).

SOLUTION: Enter Conference 2 Code equal to a valid entry in BTAB Table 'TC'.

**S307E CONFERENCE 2 DATE REQUIRED**

CAUSE: Conference 2 Code has been entered and Conference 2 Date is equal to '0'.

SOLUTION: Enter Conference 2 Date.

**S308E CONFERENCE 2 DATE INVALID**

CAUSE: Entered Conference 2 Date is invalid or not in a valid date format.

SOLUTION: Enter valid Conference 2 Date as MMDDYY or MM/DD/YY.

**S309E CONFERENCE 2 TIME REQUIRED**

CAUSE: Conference 2 Date has been entered and Conference 2 Time is equal to spaces.

SOLUTION: Enter Conference 2 Time.

**S310E CONFERENCE 2 LOC REQUIRED**

CAUSE: Conference 2 Code has been entered and Conference 2 Location Line 1 equal to spaces.

SOLUTION: Enter Conference 2 Location Line 1.

**S311E CONFERENCE 3 CODE INVALID**

CAUSE: Entered Conference 3 Code is not equal to a valid entry in BTAB Table 'TC' (Type Conference).

SOLUTION: Enter Conference 3 Code equal to a valid entry in BTAB Table 'TC'.

**S312E CONFERENCE 3 DATE REQUIRED**

CAUSE: Conference 3 Code has been entered and Conference 3 Date is equal to '0'.

SOLUTION: Enter Conference 3 Date.

**S313E CONFERENCE 3 DATE INVALID**

CAUSE: Conference 3 Date is invalid or not in a valid date format.

SOLUTION: Enter valid Conference 3 Date as MMDDYY or MM/DD/YY.

**S314E CONFERENCE 3 TIME REQUIRED**

CAUSE: Conference 3 Date has been entered and Conference 3 Time is equal to spaces.

SOLUTION: Enter Conference 3 Time.

**S316E CONFERENCE 3 LOC REQUIRED**

CAUSE: Entered Conference 3 Code has been entered and Conference 3 Location Line 1 equal to spaces.

SOLUTION: Enter Conference 3 Location Line 1.

**S317E CAN'T ADD-SOL STAT NOT LT 307**

CAUSE: Function is ADD and the Solicitation Status is greater than '307'.

SOLUTION: Update SDOC Status less than '307', or create new SDOC and attach RQSN.

**S320E CERTIF 1 TYPE INVALID**

CAUSE: Entered Certificate 1 Type is not equal to a valid entry in BTAB Table 'TR' (Type Certificate).

SOLUTION: Enter Certificate 1 Type equal to a valid entry in BTAB Table 'TR'.

**S321E CERTIF 1 AMOUNT INVALID**

CAUSE: Entered Certificate 1 Amount is not numeric.

SOLUTION: Enter numeric Certificate 1 Amount.

**S322E CERTIF 1 DUE DATE INVALID**

CAUSE: Entered Certificate 1 Due Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certificate 1 Due Date as MMDDYY or MM/DD/YY.

**S323E CERTIF 1 FROM DATE INVALID**

CAUSE: Entered Certificate 1 From Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certificate 1 From Date as MMDDYY or MM/DD/YY.

**S324E CERT 1 TO DATE W/O FROM**

CAUSE: Certificate 1 To Date is greater than '0' and From Date is '0'.

SOLUTION: Enter From Date.

**S325E CERTIF 1 TO DATE INVALID**

CAUSE: Entered Certificate 1 To Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certificate 1 To Date as MMDDYY or MM/DD/YY.

**S326E CERTIF 1 TO DATE < FROM DATE**

CAUSE: Entered Certificate 1 To Date is less than From Date.

SOLUTION: Enter To Date greater than From Date.

**S327E CERT 1 MUST NOT BE SPACES**

CAUSE: Certification data greater than spaces and Certification 1 is spaces.

SOLUTION: Enter Certification 1.

**S330E CERTIF 2 TYPE INVALID**

CAUSE: Entered Certificate 2 Type is not equal to a valid entry in BTAB Table 'TR' (Type Certificate).

SOLUTION: Enter Certificate 2 Type equal to a valid entry in BTAB Table 'TR'.

**S331E CERTIF 2 AMOUNT INVALID**

CAUSE: Entered Certificate 2 Amount is not numeric.

SOLUTION: Enter numeric Certificate 2 Amount.

**S332E CERTIF 2 DUE DATE INVALID**

CAUSE: Entered Certificate 2 Due Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certificate Due Date as MMDDYY or MM/DD/YY.

**S333E CERTIF 2 FROM DATE INVALID**

CAUSE: Entered Certificate 2 From Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certificate 2 From Date as MMDDYY or MM/DD/YY.

**S334E CERT 2 TO DATE W/O FROM**

CAUSE: Entered Certificate 2 To Date is greater than '0' and From Date has not been entered.

SOLUTION: Enter From Date.

**S335E CERTIF 2 TO DATE INVALID**

CAUSE: Entered Certificate 2 To Date is not a valid date or is not in a valid date format.

SOLUTION: Enter valid Certif 2 To Date as MMDDYY or MM/DD/YY.

**S336E CERTIF 2 TO DATE < FROM DATE**

CAUSE: Entered Certificate 2 To Date is less than Certificate 2 From Date.

SOLUTION: Enter Certificate 2 To Date greater than Certificate 2 From Date.

**S337E CERT 2 MUST NOT BE SPACES**

CAUSE: Certification data greater than spaces and certification 2 is spaces.

SOLUTION: Enter Certification 2.



**APPENDIX G - Error Message Manual**

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**S438E ERROR UPDT RQSN**

CAUSE: Error occurred in update of RQSN.  
SOLUTION: Contact the ISIS Help Desk for assistance.

**S439E CAN'T CHG T-NUM DUE TO STAT**

CAUSE: SDOC Status is '300' or '396-399' and T-Number is changed.  
SOLUTION: Update SDOC Status and make change.

**S441E GRACE PERIOD HAS EXPIRED**

CAUSE: The fiscal year of the requisition attached to the solicitation is less than the current fiscal year.  
SOLUTION: None - Can not process a prior fiscal year requisition.

**S448E TIME IS INVALID**

CAUSE: Entered a revised bid open time on SDO3 in an invalid format.  
SOLUTION: Enter time in a hh:mm format.

**S449E STATUS CODE MUST BE 330**

CAUSE: Degree of Difficulty changed without changing the Solicitation Status Code to '330'.  
SOLUTION: Change Status Code to '330' (Prepare Schedule) if changing Degree of Difficulty.

**S450E MBRC INVALID FOR BID BOND CODE**

CAUSE: Bid Bond Code equal to '3' (Required and Not Received), and entered Master Bid Return Code is '01'.  
SOLUTION: Update Bid Bond Code on SVE3 before bid can be recorded, or enter MBRC equal to '43' (Bid Bond Not Received).

**S451E PHONE IS NOT NUMERIC**

CAUSE: Entered Phone Number, Area Code, Prefix or Digit is not numeric.  
SOLUTION: Enter only numeric Area Code, Prefix or Digit.

**S452E MAX ALLOWED DECIMALS EXCEEDED**

CAUSE: Entered number of decimal positions to the right of the decimal exceed the allowed number of decimals for that numeric field.  
SOLUTION: Enter allowed number of positions to right of the decimal for that field.

**S455E REV BID OPEN < CURRENT DATE**

CAUSE: Entered Revised Bid Open Date is less than Current Date.

SOLUTION: Enter Revised Bid Open Date equal to or greater than Current Date.

**S456E CONTRACT BEGIN BEFORE CURRENT**

CAUSE: Entered Contract Begin Date is less than Current Date.

SOLUTION: Enter Contract Begin Date greater than Current Date.

**S464E SOLICITATION NOT SCHEDULED**

CAUSE: Status Code changed to '350/360' and SDOC schedule dates are spaces.

SOLUTION: Use SDO3 and schedule the solicitation (SC = '330'), then change SDOC Status to '350/360'.

**S465E S/C HAS NOT BEEN PROC AT 361**

CAUSE: Status changed to equal to or greater than '365' and the solicitation has not been issued.

SOLUTION: Issue solicitation, then set Status to '365' or greater.

**S468E NO SVEN RECORDS EXIST**

CAUSE: Status changed to '365' and there are no SVEN (Solicitation Vendor) records.

SOLUTION: Issue solicitation or add Vendor to SVE2, then set Status to '365'.

**S472E NO BIDS RECEIVED**

CAUSE: Status changed to '370' or '375' to print a bid tabulation and no bids have been recorded.

SOLUTION: Record bids, then set SDOC Status to print bid tabulation.

**S473E BID OPEN DATE & TIME REQUIRED**

CAUSE: Status changed to '355' or '360' to print solicitation and there is no Bid Open Date or Time on SDO3.

SOLUTION: Schedule Bid Open Date and Time before attempting to print solicitation.